



Canadian Horticulture Sector

2007 Crop Year

Performance Overview

May 2008



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OVERVIEW

For purposes of this report, the horticultural sector includes potatoes, field grown vegetables, greenhouse vegetables, fruits, ornamental products (floriculture, nursery, Christmas trees, sod), honey and maple products unless indicated otherwise. Note that the 2007 production data is considered preliminary and subject to revision by Statistics Canada.

In 2007, the horticultural sector represented \$5.4 billion in agricultural Farm Cash Receipts (excluding receipts from risk management and disaster programs) from farming operations in Canada. This represented almost 15% of all agricultural farm cash receipts in 2007. Horticulture ranks third in farm cash receipts behind the grains sector at \$6.5 billion and cattle at \$5.6 billion, but ahead of dairy at \$5.2 billion.

Over 70% of horticultural production is concentrated in Ontario, British Columbia and Quebec. In 2007, the ornamental sector accounted for the largest share of horticultural farm cash receipts (39%), followed by vegetables (30%), potatoes (15%), fruits (11%), maple (3%) and honey (less than 2%).

The horticulture sector represented \$3.7 billion in fresh and processed export value and \$6.5 billion in import value in 2007. Fruits and vegetables (including potatoes) accounted for the bulk of Canada's trade in horticultural products, representing 84% of the total value of exports and 93% of the total value of imports of horticultural products.

Potatoes

With almost \$839 million in farm cash receipts in 2007, the potato is the most important vegetable crop in Canada accounting for 34% of all vegetable farm cash receipts (including potatoes).

In 2007, total potato production was estimated at almost 4.97 million metric tons (million t), a 2% decrease over the 2006 crop, and 6% below the record crop of 2003. The area planted and harvested in 2006 and 2007 were similar. The area harvested in 2007 was 158,900 hectares (ha) slightly above the 158,200 ha harvested in 2006, while yield reached 31.26 metric tons per hectare (t/ha) representing a 3% decrease from 2006.

Good weather conditions in most Canadian provinces in 2007 resulted in one of the best yielding potato crops in history at 31.26 t/ha. Alberta and British Columbia were the only provinces in 2007 to break the 33.6 t/ha barrier (300 hundredweight/acre) for yields. Ontario experienced a drought and yields decreased by 32% to 16.03 t/ha.

World potato production and consumption are expanding at rates lower than the population growth. Production in developed countries, especially in Europe, has declined on average by 1 percent per year over the past 20 years. However, output in developing countries expanded at an average rate of 5 percent per year. Asian countries, particularly China and India, fuelled this growth. Although prices in Canada have stayed relatively consistent since 2003, the increase in world production may have a negative impact on prices in the future as Canada will compete in many of the same export markets and also feel a domestic crunch with increasing competition from low wage countries. To counteract these low prices, the United Potato Growers Association of Canada and the United States have suggested an acreage reduction program to align supply with demand in order to raise prices.

Vegetables

According to Statistics Canada preliminary data, the 2007 farm cash receipts for vegetables (excluding potatoes and greenhouse vegetables) reached \$903.5 million representing a 3.4% decrease from 2006. In 2007 cultivated area decreased by 3.6% compared to 2006 with an estimated area of 114,408 ha of which 95% were bearing. The harvested area for processing vegetables decreased by 1% in 2007 to 50,984 ha while the harvested area for vegetables destined for the fresh market decreased by 4% to 57,475 ha. In 2007 Ontario had 50% of the cultivated vegetable area in Canada, while Québec had 34%.

Greenhouse vegetables

According to Statistics Canada preliminary data, the 2007 farm cash receipts for greenhouse vegetables fell to \$716.3 million which represents a decrease of 5.5 % compared to 2006. The major producing crops in terms of value were tomatoes, peppers, cucumbers and lettuce. The main producing provinces were Ontario, with a value of \$418.2 million and British Columbia with a value of \$201.6 million while farm cash receipts for greenhouse vegetables were \$57.9 million in Quebec, \$32.2 million in Alberta and \$4.5 million in Nova Scotia.

Fruits

Apples still rank as the number one fruit in terms of tonnage, while blueberries continue to be the most important crop in terms of value. Blueberries, apples and grapes together account for almost three quarters of the total fruit bearing area and represent 63% of the farm gate value of all fruits produced in Canada.

The 2007 Canadian apple crop is estimated at 405,000 t, representing an 8% increase compared to the 2006 production level due mainly to an unexpected increase of 29% in Québec's crop and a 23% increase in the Ontario crop. Total planted area devoted to apples continues to decline while the acreage devoted to high density apple plantings is increasing in an attempt to replace older apple varieties with newer varieties that are more in demand by consumers. Canadian apple growers continue to operate in an increasingly competitive environment, with pressures in the marketplace due to world oversupply, retailer consolidation, and increased foreign competition both in the domestic as well as in export markets.

Canada's blueberry production continues to expand, particularly the production of high-bush blueberries which reached an all time high of 35,110 t in 2007. With demand for blueberries still extremely strong, the farm gate value of the 2007 high-bush blueberry reached also an all-time high of almost \$100 million, compared to \$89 million for low-bush blueberries. While the area devoted to low-bush blueberries has increased moderately in the last 5 years, the bearing and non-bearing area devoted to high-bush blueberries has more than doubled in the same time to reach more than 7,100 ha in 2007.

The Canadian cranberry industry has also grown considerably in recent years. In 2007, cranberry production was responsible for over 10% of the total fruit sector farm gate value. Total 2007 production is estimated at 67,361 t, 16% lower than the previous year's record crop of 79,819 t and worth an estimated \$69 million at the farm gate which is 14% below the previous year's all time high of more than \$80 million.

Ornamental Products

In 2007 the ornamental sector (flowers, bedding plants, trees, shrubs, turf sod and Christmas trees) remained the largest horticulture sector with farm cash receipts exceeding \$2.1 billion. Ontario had 49.9% of the receipts, followed by British Columbia with 19.3% and Quebec with 13.9%. Together these three provinces represented 83% of Canadian ornamental production. Over the last few years, nursery, floriculture and sod continued to

experience market growth. Rapid appreciation of the Canadian dollar has changed some trade patterns, and increased energy costs posed challenges for the sector. However the sector continues to grow due to increasing domestic demand. This demand can be expected to continue to grow, steadily if modestly, with demand for turf sod tied more closely to the rate of new housing development.

Maple and Honey

Canada is a significant producer and exporter of maple products and honey. In 2007 Canada's maple production, worth \$168 million (a 10 % drop over 2006) accounted for 85% of the world's maple production. 90% of Canadian maple syrup is produced in Quebec. Canada continues to export over 80% of its maple products. The 2007 Canadian honey harvest of 27,850 t (61.4 million pounds) represented a 40% drop from the record-setting 2006 harvest of 48,366 t (106 million pounds). While Canadian honey is produced in all provinces, the three Prairie Provinces produced 85% of the national total in 2007. Canada continues to be a significant exporter of honey, exporting almost 40% of the production in 2007.

Situation and Trends

Detailed Situation and Trends Reports will be prepared for each sector at a later date and posted on Agriculture and Agri-Food Canada's Horticulture website at: <http://www4.agr.gc.ca/AAFC-AAC/display-afficher.do?id=1184692853496&lang=e>.

Methodology, Sources and Legend

The source for most of the data is Statistics Canada, unless otherwise indicated. In those instances where no data was available for 2007, the most recent data that was available was presented. The analysis for each sub-sector has been provided by the commodity officer of the Horticulture Section responsible for that sector.

Farm Cash Receipts and production values reported in the tables and throughout the text are both obtained from Statistics Canada but are compiled from different sources. Production values are obtained through the Fall Fruit and Vegetable Survey (Publication 22-003-XIB) and are expressed as remuneration obtained at the "Farm Gate" and are concerned with gross returns to growers, while Farm Cash Receipts (Publication 21-011-XWE) represent the cash income received from the sale of agricultural commodities as well as direct program payments made to support the agricultural sector. It is worth noting that Farm Cash Receipts are estimated using both administrative and survey sources of data.

All dollar amounts in the tables are expressed in Canadian dollars, unless otherwise indicated.

"X" indicates unavailable data due to either confidentially requirements or missing information.

t - Metric ton

ha – Hectares

na – not available

cwt – hundredweight

HORTICULTURE SECTOR

Table 1-1 - Farm Cash Receipts from Farming Operations

Product	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07 / 06
Value (\$ Million)⁴											
Fruit ¹	486.2	572.6	546.7	531.6	517.0	540.2	584.7	551.8	592.5	602.8	2%
Vegetables ²	1,164.8	1,218.4	1,301.0	1,452.7	1,428.1	1,442.2	1,582.3	1,578.0	1,694.0	1,619.7	-4%
Potatoes	612.2	700.7	679.9	722.9	917.6	849.6	893.1	793.2	895.4	838.7	-6%
Floriculture & Nursery ³	1,282.4	1,388.4	1,659.1	1,746.9	1,906.8	1,997.2	2,001.0	2,110.9	2,023.7	2,103.5	4%
Honey	88.6	79.6	69.5	84.1	132.6	143.1	134.6	124.5	106.7	88.8	-17%
Maple	137.5	147.3	180.7	145.6	150.1	153.2	146.7	170.6	175.0	165.5	-5%
Total	3,771.6	4,107.0	4,436.9	4,683.7	5,052.1	5,125.6	5,342.4	5,329.1	5,487.3	5,419.0	-1%

¹ Apples, other tree fruit, strawberries, other berries and grapes

² Greenhouse and other vegetables, excluding potatoes

³ Floriculture and nursery, christmas trees

⁴ Excludes payment programs

Statistics Canada (Cansim Table 002-0001, Farm Cash Receipts, 21-001-XIB)

Farm cash receipts (FCR) for the Canadian horticultural sector are estimated at \$5.4 billion in 2007, 1% lower than in 2006 but 1.5% above the 5-year average value of \$5.3 billion. The most significant variation occurred in the honey sector, where FCR dropped by 17% on an annual basis to almost \$89 million and fell 26% below the 5-year average of \$120 million. This was due to higher than normal bee colony winter losses experienced by most provinces, which led to the lowest honey yields per colony in 15 years (111 pounds per colony) and consequently to a 42% drop in honey production which fell to 27,850 t (61.4 million pounds).

Table 1-2 - Number of Farms and Area in Canada

Product	1996	2001	2006	2006 / 2001
Number of Farms				
Fruits, berries and nuts	16,311	12,158	12,447	2%
Vegetables ¹	11,440	9,829	9,499	-3%
Greenhouse ²	6,422	6,071	5,613	-8%
Total	34,173	28,058	27,559	-2%
Area (ha)				
Fruits, berries and nuts	99,220	104,504	110,069	5%
Vegetables ¹	127,697	133,851	125,181	-6%
Greenhouse ²	1,274	1,793	2,196	22%
Total	228,191	240,148	237,446	-1%

¹ Without Greenhouse Farms

² Including Vegetable and Nursery Farms

According to the latest Census of Agriculture conducted in 2006, the total number of horticultural farms was 27,559 in 2006, representing a 2% drop between 2001 and 2006 and almost 20% lower than in 1996. While the number of farms declined in the vegetable and greenhouse sectors (respectively by 3% and 8%) between 2001 and 2006, the number of farms in the fruit sector increased by 2% in the same period, primarily as a result of an increase in the number of berry farms.

Total area devoted to horticultural products reached 237,446 hectares in 2006, 1% lower than in 2001 while 4% higher than in 1996. The most significant increase between the last 2 censuses occurred in the greenhouse sector, where total area increased by 22% to 2,196 hectares. The vegetable sector which accounted for 53% of the total area in 2006, experienced a 6% drop in area between 2001 and 2006, while the fruit sector, accounting for 46% of the total area saw a 5% increase in total area during the same time, primarily thanks to increased acreage in blueberries and grapes.

Table 1-3 - Horticulture Exports

Product	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Fruit ¹	420.2	495.9	558.4	618.2	656.1	662.2	745.1	804.9	883.5	914.2	3%
Vegetables ²	590.7	662.5	761.1	891.1	970.6	1,055.7	1,145.1	1,104.5	1,133.6	1,078.2	-5%
Potatoes ³	672.9	774.1	852.0	915.0	988.3	1,038.9	1,099.2	1,012.3	1,042.1	1,125.5	8%
Floriculture and Nursery	360.3	392.2	447.9	513.4	522.0	480.6	453.3	386.5	359.6	326.0	-9%
Honey	28.4	31.0	31.0	32.6	88.0	62.9	47.2	30.1	33.1	37.5	13%
Maple	113.0	110.5	105.9	128.6	154.0	147.2	154.1	165.3	190.2	217.3	14%
Total	2,185.5	2,466.2	2,756.3	3,098.9	3,379.0	3,447.5	3,644.0	3,503.6	3,642.1	3,698.7	2%

¹ Fresh and Processed Fruit including wine

² Fresh and processed vegetables, including greenhouse but excluding potatoes

³ Fresh and processed potatoes

Statistics Canada

The value of exports of horticultural products reached \$3.7 billion in 2007, representing a 2% increase over 2006 and a 3% increase over the 5-year average. Higher export values for potatoes (+8%), fruits (+3%), honey (+13%) and maple (+14%) were responsible for the overall increase in export values in 2007, while export values for vegetables and ornamental products (floriculture and nursery) were both down respectively by 5% and 9%.

Table 1-4 - Horticulture Imports

Product	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Fruit ¹	3,206.3	3,428.0	3,517.9	3,695.1	4,028.6	4,209.0	4,337.0	4,594.9	4,985.5	4,584.4	-8%
Vegetables ²	1,832.7	1,843.8	2,008.9	2,192.0	2,401.5	2,346.1	2,333.1	2,444.0	2,508.8	1,468.5	-41%
Potatoes ³	206.8	195.2	193.7	221.7	313.9	221.0	216.8	212.7	239.0	162.3	-32%
Floriculture and Nursery	293.6	302.1	318.7	348.7	358.3	348.1	359.5	361.5	360.5	263.9	-27%
Honey	4.7	5.1	4.7	8.4	23.3	25.3	23.0	19.5	13.3	6.0	-55%
Maple	2.1	2.2	1.4	2.7	3.6	3.7	5.4	4.3	5.3	1.0	-81%
Total	5,546.1	5,776.3	6,045.3	6,468.5	7,129.0	7,153.3	7,274.8	7,637.0	8,112.4	6,486.1	-20%

¹ Fresh and processed fruit including wine

² Fresh and processed vegetables, includes greenhouse but excludes potatoes

³ Fresh and processed potatoes

Statistics Canada

The value of imports of horticultural products which reached \$6.5 billion in 2007 was \$1.6 billion lower than in 2006, representing a 20% annual drop and a 12% decrease compared to the 5-year average. Although import values declined in all horticultural sectors, the decline of the import values for fruits and vegetables accounted for almost 90% of the total drop.

Table 1-5 - Horticulture Exports to Major Countries*

Country	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
United States	1,824.8	2,076.4	2,413.7	2,764.0	3,037.3	3,040.0	3,128.7	2,980.0	3,095.1	3,064.4	-1%
Japan	67.0	84.0	88.7	97.2	105.6	113.8	134.7	128.2	124.2	112.9	-9%
United Kingdom	36.1	40.9	33.7	31.0	31.9	29.4	36.2	35.9	36.2	44.2	22%
Germany	35.8	34.7	33.2	27.7	31.5	31.8	31.9	33.3	36.1	51.5	43%
Netherlands	11.9	15.7	18.6	17.9	11.9	11.1	21.2	17.8	28.4	30.1	6%
Mexico	3.3	4.3	5.1	8.9	12.2	18.0	22.1	31.9	34.7	35.1	1%

*Includes: Fresh and Processed Fruit and Vegetables, Floriculture and Nursery, Maple and Honey;

Statistics Canada

The U.S. which remains the top export destination for Canada's horticultural products, accounted for almost 83% of the dollar value of our horticultural exports, followed by Japan (3%), Germany (1.4%), the UK (1.2%) and Mexico (0.9%). The value of our horticultural exports to the U.S. has stayed relatively stable over the last five years, but is 68% up compared to 1998, while the value of our exports to Mexico has increased tenfold during the last ten years from \$3.3 million in 1998 to \$35.1 million. Other major export markets which have also seen significant increases in the value of our horticultural products include the Netherlands (+252%) and Japan (+69%).

Table 1-6 - Horticulture Imports from Major Countries*

Country	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
United States	3,143.0	3,165.8	3,378.1	3,604.8	3,933.6	3,701.8	3,742.2	3,847.2	3,996.8	2,973.3	-26%
Mexico	248.2	235.2	240.8	281.1	342.5	398.3	416.4	457.8	509.9	445.7	-13%
France	271.6	293.8	289.3	325.8	322.9	389.7	364.5	371.7	399.7	415.5	4%
Chile	189.0	205.5	223.5	230.2	256.8	279.8	330.4	338.6	370.8	362.5	-2%
Italy	170.8	193.9	198.9	217.3	239.2	273.0	272.5	278.1	327.3	356.0	9%
Australia	71.9	85.3	106.1	129.3	166.9	217.4	256.8	297.6	316.4	321.9	2%
Costa Rica	0.0	87.9	105.1	116.2	124.8	156.6	147.9	154.7	162.5	33.0	-80%
China, P. Rep.	71.7	80.7	108.4	105.3	124.1	128.9	147.5	170.2	194.4	209.7	-38%
Spain	103.9	122.1	122.4	113.9	128.9	136.0	135.5	130.6	143.8	120.4	-97%
Colombia	104.0	104.6	97.5	109.3	126.8	122.3	123.4	150.3	160.0	4.2	-97%
Brazil	101.9	127.2	124.9	114.5	128.6	119.1	88.1	104.1	138.5	145.9	5%
South Africa	92.1	118.0	101.4	90.1	100.3	105.0	111.9	120.5	122.6	88.2	-28%
Ecuador	97.5	102.5	95.6	97.0	118.2	103.5	87.3	86.2	97.9	18.5	-81%
Netherlands	66.1	72.8	82.4	92.1	90.4	89.5	96.3	88.1	83.0	71.3	-14%
Argentina	49.5	62.2	50.1	63.5	72.3	70.7	62.8	82.5	96.1	94.1	-2%

*Includes: Fresh and Processed Fruit and Vegetables, Floriculture and Nursery, Maple and Honey;

Statistics Canada

The U.S. which is also the number one source country for Canada's horticultural imports, accounted for almost 46% of the dollar value of our horticultural imports, followed by Mexico (6.9%), France (6.4%), Chile (5.6%), Italy (5.5%), Australia (5%) and China (3.2%). The value of our horticultural imports from the US stood at almost \$3.0 billion in 2007, 26% lower than in 2006 and 19% below the 5-year average. While the US share of the dollar value of our horticultural imports shows a declining trend over the last ten years (from 57% in 1998 to 46% in 2007), the share of the other countries listed above has been steadily increasing over the same period, illustrating the fact that Canada has been increasingly diversifying its sources of imports for horticultural products. During the 1998 to 2007 period the other listed countries saw the value of their horticultural exports

to Canada increase by: 448% for Australia, 292% for China, 208% for Italy, 192% for Chile, 180% for Mexico and 153% for France.

POTATO SECTOR

Table 2-1 - Canadian Potato Production by Province

Volume ('000 t)			
Province	2006	2007	07/06
Newfoundland	7.3	5.6	-24%
Prince Edward Island	1,347.1	1,241.1	-8%
Nova Scotia	24.8	25.5	3%
New Brunswick	802.9	769.5	-4%
Quebec	529.0	543.4	3%
Ontario	341.3	233.5	-32%
Manitoba	974.9	1,073.2	10%
Saskatchewan	126.1	105.6	-16%
Alberta	830.0	863.2	4%
British Columbia	108.0	108.9	1%
Canada	5,091.3	4,969.5	-2%

Canadian potato production for 2007 is estimated at 4,969,500 t, representing a 2% decline from 2006 but close to the 5 year average. It is important to note that production in Ontario decreased by 32% from 341,000 t in 2006 to 233,500 t in 2007 due to a drought that negatively affected the crop. As can be seen in Table 2-1, potato production was mostly concentrated in Prince Edward Island (25%), Manitoba (22%), Alberta (17%), and New Brunswick (15%). The Atlantic region represented 41% of the Canadian production, the Western region 43% and the Central region 16%.

Table 2-2 - Potato Farm Cash Receipts

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Newfoundland	1.2	1.2	1.2	1.2	1.4	2.1	2.1	1.9	2.8	2.8	-2%
Prince Edward Island	173.3	192.2	154.5	123.9	189.9	186.5	152.7	161.7	202.9	180.6	-11%
Nova Scotia	6.3	8.4	10.2	8.2	10.8	9.2	10.5	9.5	5.8	4.4	-24%
New Brunswick	83.0	93.0	78.8	100.8	126.8	96.5	87.3	77.2	113.5	89.3	-21%
Quebec	65.6	84.7	85.6	95.7	110.7	90.3	94.7	101.6	115.5	84.7	-27%
Ontario	54.8	62.6	65.6	71.9	87.3	86.2	88.2	64.1	89.8	71.7	-20%
Manitoba	105.5	118.6	111.3	131.3	132.8	138.1	156.0	154.2	137.1	183.6	34%
Saskatchewan	33.6	29.1	26.0	40.3	51.4	58.1	61.2	24.2	32.6	31.8	-2%
Alberta	63.9	74.9	113.1	107.1	146.8	132.1	184.7	137.8	152.1	141.9	-7%
British Columbia	25.0	35.9	33.6	42.5	59.7	50.5	55.7	61.0	43.3	47.9	11%
Canada	612.2	700.7	679.9	722.9	917.6	849.6	893.1	793.2	895.4	838.7	-6%

Statistics Canada (Table 002-0001, 21-001-X1B)

Canada is the 12th largest potato producer in the world with production close to 5 million metric tons in 2007. With \$838.7 million in farm cash receipts in 2007, the potato is one of the most important vegetable crops in Canada, accounting for 34% of total vegetable farm cash receipts (including potatoes). Potato farm cash receipts (FCR) have been variable in the last five years, declining by 11% from \$893.1 million in 2004 to \$793.2 million in 2005, but regaining momentum in 2006 when they increased by almost 13% to reach \$895.4 million and then decreasing by 6% to \$838.7 million in 2007.

Table 2-3 - Canadian Potato Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Area Planted (ha)											
Newfoundland	300	300	200	200	300	300	300	300	300	300	0%
Prince Edward Island	45,300	45,700	44,100	43,300	44,100	42,900	42,900	39,000	39,500	38,900	-2%
Nova Scotia	2,000	2,100	2,100	2,100	2,200	2,100	2,100	1,400	1,100	1,000	-9%
New Brunswick	23,100	22,700	22,300	23,600	23,500	23,900	23,700	23,500	24,200	23,700	-2%
Quebec	18,600	17,900	18,600	18,900	19,800	20,200	19,300	19,700	19,400	17,100	-12%
Ontario	17,400	17,600	17,700	17,600	17,700	18,200	16,200	14,700	15,400	15,000	-3%
Manitoba	29,900	29,900	31,600	31,400	35,600	41,700	38,900	34,800	32,600	34,400	6%
Saskatchewan	5,500	3,200	4,200	5,100	5,300	5,500	5,000	4,500	4,500	3,900	-13%
Alberta	13,400	17,400	21,400	23,600	25,100	26,700	23,500	22,700	22,200	23,000	4%
British Columbia	3,400	3,300	3,400	3,500	3,600	3,700	3,600	3,500	3,500	3,600	3%
Canada	158,900	160,100	165,600	169,300	177,200	185,200	175,300	164,000	162,700	160,800	-1%
Area Harvested (ha)											
Newfoundland	300	200	200	200	300	300	200	200	300	300	0%
Prince Edward Island	44,500	44,500	43,700	43,300	43,500	42,700	42,700	38,800	38,700	38,800	0%
Nova Scotia	1,900	1,900	2,100	2,100	2,200	2,100	1,900	1,300	1,000	1,000	0%
New Brunswick	22,900	22,300	22,300	23,200	23,500	23,700	23,500	22,800	23,900	23,700	-1%
Quebec	18,300	17,600	18,100	18,600	19,400	19,800	18,700	19,200	18,200	16,700	-8%
Ontario	17,400	16,900	16,100	17,300	16,900	17,800	15,800	14,400	14,600	14,600	0%
Manitoba	29,300	29,500	29,900	30,200	34,000	41,100	37,600	30,800	32,200	34,200	6%
Saskatchewan	5,300	3,200	4,100	5,000	5,100	5,300	4,800	4,400	4,200	3,800	-10%
Alberta	13,000	17,100	19,300	23,200	22,600	24,700	23,100	20,800	21,600	22,600	5%
British Columbia	3,200	3,300	3,400	3,500	3,500	3,600	3,400	3,300	3,400	3,200	-6%
Canada	156,100	156,500	159,200	166,600	171,000	181,100	171,800	156,300	158,200	158,900	0%
Average Yield (t/ha)											
Newfoundland	14.33	14.50	20.50	22.00	17.33	22.67	21.30	18.61	25.78	19.61	-24%
Prince Edward Island	29.71	29.15	30.27	19.28	31.39	29.70	30.82	30.82	34.75	31.94	-8%
Nova Scotia	23.47	24.05	26.95	16.86	24.95	24.14	26.34	24.10	23.54	25.22	7%
New Brunswick	29.76	27.97	28.53	28.06	29.11	28.55	31.94	29.14	33.62	32.50	-3%
Quebec	25.96	26.14	26.22	25.77	23.55	26.63	29.76	25.48	29.06	32.52	12%
Ontario	20.22	20.76	21.30	20.76	18.69	22.93	22.64	19.50	23.43	16.03	-32%
Manitoba	26.38	25.25	28.07	26.22	24.66	27.45	27.46	23.54	30.26	31.38	4%
Saskatchewan	29.94	28.00	29.90	27.34	31.69	35.04	31.38	29.70	30.26	27.46	-9%
Alberta	33.15	32.54	34.75	35.29	31.36	36.97	39.23	38.56	38.33	38.22	0%
British Columbia	27.22	29.30	28.79	31.20	32.69	32.72	32.50	30.82	31.38	33.62	7%
Canada	27.73	27.27	28.69	25.33	27.52	29.17	30.49	28.37	32.18	31.26	-3%
Total Production ('000 t)											
Newfoundland	4	3	4	4	5	7	5	5	7	6	-24%
Prince Edward Island	1,322	1,297	1,323	835	1,365	1,268	1,316	1,197	1,347	1,241	-8%
Nova Scotia	45	46	57	35	55	51	52	32	25	26	3%
New Brunswick	682	624	636	651	684	677	750	666	803	770	-4%
Quebec	475	460	475	479	457	527	556	489	529	543	3%
Ontario	352	351	343	359	316	408	357	280	341	234	-32%
Manitoba	773	745	839	792	838	1,128	1,034	724	975	1,073	10%
Saskatchewan	159	90	123	137	162	186	152	131	126	106	-16%
Alberta	431	556	671	819	709	913	905	804	830	863	4%
British Columbia	87	97	98	109	114	118	109	106	108	109	1%
Canada	4,329	4,268	4,568	4,221	4,705	5,283	5,235	4,433	5,091	4,970	-2%

Statistics Canada (22-008-XIE)

Table 2-3 - Canadian Potato Production (Continued)

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	06/05
Potatoes Sold, Consumed, Seeded or Fed to Livestock ('000 t)											
Newfoundland	4	3	4	4	5	6	5	4	7	na	59%
Prince Edward Island	1,298	1,279	1,023	830	1,352	1,255	1,295	1,182	1,320	na	12%
Nova Scotia	41	43	54	33	52	48	54	30	23	na	-22%
New Brunswick	644	599	613	639	663	649	665	646	777	na	20%
Quebec	459	448	453	471	441	503	509	469	465	na	-1%
Ontario	326	337	322	341	299	363	304	261	307	na	18%
Manitoba	698	681	825	779	829	996	1,001	715	965	na	35%
Saskatchewan	136	81	114	128	150	178	117	115	115	na	0%
Alberta	392	523	659	800	695	899	889	790	814	na	3%
British Columbia	79	90	93	104	109	112	98	101	103	na	2%
Canada	4,078	4,084	4,158	4,130	4,595	5,010	4,937	4,282	4,896	na	14%
Value (Cdn \$ ' 000)											
Newfoundland	1,445	1,140	1,399	1,395	1,940	2,280	1,725	1,841	3,301	na	79%
Prince Edward Island	218,355	195,617	139,947	192,511	229,825	162,248	165,376	234,915	201,812	na	-14%
Nova Scotia	7,141	8,986	11,775	7,085	11,656	9,785	10,804	6,247	5,209	na	-17%
New Brunswick	103,102	94,750	91,868	152,967	118,321	91,198	83,241	127,547	100,538	na	-21%
Quebec	83,750	86,075	86,317	120,938	104,361	86,849	88,349	120,592	103,468	na	-14%
Ontario	61,013	65,182	61,957	89,842	91,778	88,194	65,838	74,003	86,221	na	17%
Manitoba	115,035	117,748	143,643	143,463	149,157	163,384	167,980	136,629	187,057	na	37%
Saskatchewan	38,242	29,431	38,460	52,195	58,899	60,255	33,245	36,787	34,476	na	-6%
Alberta	75,696	104,829	110,571	153,435	148,638	169,375	168,103	153,213	157,609	na	3%
British Columbia	32,447	37,782	35,657	46,812	63,455	49,197	45,787	49,979	46,310	na	-7%
Canada	736,226	741,540	721,594	960,643	978,030	882,765	830,448	941,753	925,999	na	-2%
Average Price (\$/t)											
Newfoundland	370.51	438.46	368.16	348.75	395.92	361.90	359.38	432.10	488.32	na	13%
Prince Edward Island	168.19	152.97	136.85	231.83	170.05	129.31	127.71	197.75	153.00	na	-23%
Nova Scotia	172.49	209.95	219.27	213.40	223.30	203.43	200.82	210.54	225.53	na	7%
New Brunswick	160.00	158.18	149.84	239.46	178.41	140.48	125.12	197.53	129.41	na	-34%
Quebec	182.46	192.13	190.71	256.71	236.43	172.80	173.44	257.28	222.66	na	-13%
Ontario	187.21	193.48	192.53	263.47	307.05	242.76	216.57	283.73	280.64	na	-1%
Manitoba	164.90	172.80	174.20	184.12	179.99	164.06	167.81	191.14	193.78	na	1%
Saskatchewan	281.40	362.00	337.66	407.14	392.40	338.51	283.42	320.33	299.38	na	-7%
Alberta	192.91	200.36	167.71	191.70	213.78	188.34	189.11	194.00	193.56	na	0%
British Columbia	410.72	418.41	385.48	452.29	582.16	438.48	468.17	496.25	450.84	na	-9%
Canada	180.54	181.56	173.55	232.61	212.84	176.21	168.20	218.03	189.15	na	-13%

na data not available

Statistics Canada (22-008-XIE)

As seen in table 2-3, in 2003 a high per hectare yield (29.17 t/ha) and a record harvested acreage (181,000 ha) resulted in the largest crop in history. Fluctuations in the currency exchange rate (Canadian versus U.S. dollar) have also been a strong contributing factor in the expansion of the Canadian potato industry, particularly between 1993 and 2002, when the value of the Canadian dollar was low. Since 2003, a higher Canadian dollar has contributed to slow the expansion of the Canadian potato industry and to reverse the trend.

In 2007 total potato production was estimated at 4.97 million metric tons, a 2 % decrease over the 2006 crop, and 6% below the record crop of 2003. The area planted in 2007 was 160,800 ha down by 0.01% from 162,700 ha in 2006 and the area harvested in 2007 was down by 0.4% from 2006, while average yield reached 31.26 t/ha representing a 3 % decrease from 2006.

Conditions were good in most of Canada. Two provinces, Alberta and BC, broke the 33.6 t/ha barrier (300 cwt/acre) for yields, with PEI, New Brunswick, Quebec and Manitoba not far behind. Ontario was hit with a drought which negatively affected production. In Ontario, the areas planted and harvested were similar to past years (a 3% decrease since 2006) but in contrast, due to the effect of the drought, the average yield fell by 32% from 23.43 t/ha to 16.03 t/ha in 2007.

The estimated value of the crop in 2006 was close to \$926 million, 2% lower than in 2005 (the value of the 2007 crop is not available yet), while the average price per metric ton was 13% lower than in 2005 (from \$218.03/t to \$189.15/t). The crop value has been somewhat variable since 2002, falling by 15% between 2002 and 2004 from \$978 million to \$ 830 million, and back up by 11% between 2004 and 2006 to \$926 million. The average price per metric ton has also been fluctuating from \$212.84/t in 2002 to \$168.2/t in 2004 (20% drop), then back up by 30% to \$218/t in 2005 before declining by 13% to 189.15 \$/t in 2006.

In October of 2007, golden nematode was found in soils in two seed potato farms in Alberta. The Canadian Food Inspection Agency (CFIA) and the United States Department of Agriculture (USDA) placed temporary restrictions on the movement of potatoes from Alberta to the U.S. in November 2007 pending soil test results. On December 3, 2007, Mexico's Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food (SAGARPA) imposed temporary restrictions prohibiting the import of seed potatoes and potatoes for consumption and processing originating from Alberta.

In May 2008, following extensive negotiations with the United States, Canada and the U.S. reached an agreement to reopen American markets to Alberta seed potatoes. This agreement has been made through the establishment of revised potato cyst nematode (PCN) phytosanitary guidelines which outline requirements for PCN containment, risk mitigation, soil sampling and testing. As part of the new PCN export certification requirements, developed in consultation with stakeholders and growers, all fields used to produce seed potatoes for export to the U.S. must be soil sampled using a full field grid pattern. Additionally, all land used to produce seed potatoes in a province or state with an area regulated for PCN, or a new PCN detection, must be soil sampled and tested for PCN. Additional information on this subject can be found on the CFIA's website at: <http://www.inspection.gc.ca/english/plaveg/pestrava/gloros/glorose.shtml>. The CFIA is currently in discussions with Mexican authorities to seek Mexico's acceptance of similar regulated areas in order to reopen Mexican borders to Alberta seed potatoes.

Table 2-4 - Canada's Fresh Potato Export and Import Markets (August to July)

Type	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change*
Value (\$ ' 000)											
Table Stock											
Exports	125,077	119,814	100,151	71,882	126,484	126,256	88,632	91,265	121,409	144,868	19%
Imports	93,580	81,327	91,552	93,122	154,843	108,511	88,603	58,589	72,855	92,409	27%
Trade Balance	31,497	38,487	8,599	-21,240	-28,359	17,745	29	32,676	48,554	52,459	8%
Seed											
Exports	59,753	59,943	56,655	34,257	52,143	44,878	40,697	35,554	32,177	39,592	23%
Imports	4,214	3,365	3,671	3,754	3,409	3,824	4,376	3,200	3,093	2,535	-18%
Trade Balance	55,539	56,578	52,984	30,503	48,734	41,054	36,321	32,354	29,084	37,057	27%
Total											
Exports	184,830	179,757	156,806	106,139	178,627	171,134	129,329	126,819	153,586	184,460	20%
Imports	97,794	84,692	95,223	96,876	158,252	112,335	92,979	61,789	75,948	94,944	25%
Trade Balance	87,036	95,065	61,583	9,263	20,375	58,799	36,350	65,030	77,638	89,516	15%
Volume (t)											
Table Stock											
Exports	435,335	373,289	339,260	233,377	280,581	342,523	307,831	315,918	305,910	471,491	54%
Imports	229,427	199,165	241,877	222,410	272,779	245,444	221,497	152,326	183,525	183,294	0%
Trade Balance	205,908	174,124	97,383	10,967	7,802	97,079	86,334	163,592	122,385	288,197	135%
Seed											
Exports	190,544	180,778	168,561	107,073	140,399	126,888	152,292	134,561	105,479	118,926	13%
Imports	14,864	11,767	12,526	12,648	10,048	11,921	13,825	11,630	12,222	9,725	-20%
Trade Balance	175,680	169,011	156,035	94,425	130,351	114,967	138,467	122,931	93,257	109,201	17%
Total											
Exports	625,879	554,067	507,821	340,450	420,980	469,411	460,123	450,479	411,389	590,417	44%
Imports	244,291	210,932	254,403	235,058	282,827	257,365	235,322	163,956	195,747	193,019	-1%
Trade Balance	381,588	343,135	253,418	105,392	138,153	212,046	224,801	286,523	215,642	397,398	84%

*% Change from 2005-2006 to 2006-2007

Statistics Canada

Table 2-5 - Canadian Processed Potato Exports and Imports (August to July)

Type	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change*
Value (\$ ' 000)											
Frozen¹											
Exports	419,242	513,659	637,272	651,218	738,353	745,081	809,759	898,498	814,173	830,344	2%
Imports	29,526	29,047	18,121	24,109	39,747	37,930	41,051	46,305	59,314	64,449	9%
Trade Balance	389,716	484,612	619,151	627,109	698,606	707,151	768,708	852,193	754,859	765,895	1%
Others²											
Exports	19,756	23,021	55,938	79,912	79,562	94,156	85,170	70,241	62,318	64,354	3%
Imports	90,065	90,958	89,523	85,588	116,621	106,988	94,401	118,289	86,707	91,830	6%
Trade Balance	-70,309	-67,937	-33,585	-5,676	-37,059	-12,832	-9,231	-48,048	-24,389	-27,476	13%
Total											
Exports	438,998	536,680	693,210	731,130	817,915	839,237	894,929	968,739	876,491	894,698	2%
Imports	119,591	120,005	107,644	109,697	156,368	144,918	135,452	164,594	146,021	156,279	7%
Trade Balance	319,407	416,675	585,566	621,433	661,547	694,319	759,477	804,145	730,470	738,419	1%
Volume (t)											
Frozen¹											
Exports	455,255	528,173	622,449	637,197	738,408	789,898	912,559	1,039,155	959,726	989,924	3%
Imports	25,436	23,682	14,764	19,263	33,219	30,872	32,759	33,868	40,535	47,908	18%
Trade Balance	429,819	504,491	607,685	617,934	705,189	759,026	879,800	1,005,287	919,191	942,016	2%
Others²											
Exports	13,859	12,701	28,912	38,394	40,914	51,295	53,174	50,076	43,254	44,645	3%
Imports	39,538	42,036	39,431	39,162	49,801	47,212	41,686	42,059	33,660	35,226	5%
Trade Balance	-25,679	-29,335	-10,519	-768	-8,887	4,083	11,488	8,017	9,594	9,419	-2%
Total											
Exports	469,114	540,874	651,361	675,591	779,322	841,193	965,733	1,089,231	1,002,980	1,034,569	3%
Imports	64,974	65,718	54,195	58,425	83,020	78,084	74,445	75,927	74,195	83,134	12%
Trade Balance	404,140	475,156	597,166	617,166	696,302	763,109	891,288	1,013,304	928,785	951,435	2%

*% Change from 2005-2006 to 2006-2007

¹ French fries and potatoes, frozen, uncooked

² Chips, dried, starch, canned and salad potatoes

Statistics Canada

According to Tables 2-4 and 2-5, Canada's total exports of fresh and processed potatoes during the 2006-2007 marketing year were \$1.08 billion. Imports totalled \$251 million resulting in a net positive trade balance of \$828 million. The export value of fresh and processed potatoes represented almost 50% of all exports of fresh and processed vegetables. The United States is Canada's main export market. From 2003 to 2005, the value of Canada's exports of fresh and processed potatoes increased by 8% from \$1.01 billion to \$1.09, but fell by 5% between 2005 to 2006 before rising again to \$1.08 billion in 2007 (4% higher than 2006). Since 2003, the import market for fresh and processed potatoes has been decreasing, although there was a rebound in 2007. Since 2003, when imports of fresh and processed potatoes were valued at \$257 million, the value of products entering Canada decreased by 14% to \$222 million in 2006, but rose by 13% in 2007 to \$251 million.

Trade in Table Potatoes

Based on the 2006-2007 marketing year, Canada's exports of table potatoes were 471,491 t, up 54% from 2005-2006 and 35% above the 5 year average of 348,734 t. The value of table stock potato shipments was \$144.9 million, up 20% from 2005-2006. The 2006-2007 price of 307.5 \$/t was 30% lower than the 2005-2006 price of 396.8 \$/t price and 7% less than the previous five-year average of 329 \$/t. During the 2005-2006 marketing season the United States accounted for 91% of the export value. Other important markets in terms of value were Thailand (\$2.0m), Trinidad-Tobago (\$1.72m), Dominican Republic (\$1.54m), Venezuela (\$1.53m) and Barbados (\$1.22m). Canada imports U.S. fresh table potatoes mainly during the period May to July with 64% of imports coming from the states of Washington and California. Trade in table potatoes was at its lowest in 5 years in 2003 with export values of \$88.6 million, while export values have risen consistently between 2003 and 2007 to reach \$144.9 million in 2007, which is 26% higher than the 5 year average of \$114.5 million.

Trade in Seed Potatoes

Seed export volume increased by 11% during the 2005-2006 crop year from 111,980 t to 124,500 t, while the export value increased by 35% from \$29.5 million to \$39.7 million. Exports to the U.S. accounted for \$27.5 million or 69% of Canada's seed potato exports. Other valued seed markets during the period include Mexico (\$5.3m), Cuba (\$3.6m), Venezuela (\$1.1m) and Uruguay (\$0.8m). Alberta exported 53,100 t of seed potatoes followed by New Brunswick with 31,600 t, Prince Edward Island with 13,900 t, Saskatchewan with 11,300 t, British Columbia with 10,800 t and Manitoba with 2,900 t. In 2005-2006, Canada exported seed potatoes to 18 countries compared to 20 the previous year. In the same period Canada imported 8,400 t worth \$2.2 million of seed potatoes all from the U.S. In the last 5 years exports of seed potatoes were the lowest in crop year 2005-2006 with an export value of \$32.2 million. Export values were at their highest in the last 5 years in 2002-2003 when they reached \$44.9 million, 39% higher than in 2005-2006.

Table 2-6 - World Potato Production

Country	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Volume (Million t)												
China	53.1	57.3	64.6	56.1	66.3	64.6	70.2	68.1	71.2	73.5	70.3	-4%
Russian Federation	38.7	37.0	31.4	31.3	34.0	35.0	32.9	36.7	35.9	37.3	38.5	3%
India	18.8	24.2	17.6	23.6	24.7	22.5	24.5	25.0	25.0	25.0	23.9	-4%
United States	22.6	21.1	21.6	21.7	23.3	19.9	20.9	20.8	20.7	19.1	19.7	3%
Ukraine	18.4	16.7	15.4	12.7	19.8	17.3	16.6	18.5	20.8	19.5	19.5	0%
Poland	27.2	20.8	25.9	19.9	24.2	19.4	15.5	13.7	14.0	10.4	9.0	-13%
Germany	13.6	12.1	11.7	12.0	13.7	11.9	11.5	9.9	13.0	11.6	10.1	-13%
Belarus	10.9	6.9	7.6	7.5	8.7	7.8	7.4	8.6	9.9	8.2	8.3	1%
Netherlands	8.1	8.0	5.2	8.3	8.2	7.1	7.4	6.5	7.5	6.8	6.5	-4%
France	6.2	6.7	6.1	6.6	6.4	6.1	6.9	6.3	7.3	6.7	6.3	-6%
United Kingdom	7.2	7.1	6.4	7.1	6.6	6.6	7.0	5.9	6.3	5.8	5.6	-3%
Canada	4.1	4.2	4.3	4.3	4.6	4.2	4.7	5.3	5.2	4.3	5.0	16%
Turkey	5.0	5.1	5.3	6.0	5.4	5.0	5.2	5.3	4.8	4.2	4.4	5%
Romania	3.6	3.2	3.3	4.0	3.5	4.0	4.1	3.9	4.2	3.7	4.0	8%
Bangladesh	1.5	1.5	1.6	2.8	2.9	3.2	3.0	3.4	3.9	4.9	4.2	-14%
Iran	3.1	3.3	3.4	3.4	3.7	3.5	3.8	4.2	4.6	4.6	4.8	4%
Colombia	2.8	2.7	2.5	2.8	2.9	2.9	2.8	1.8	1.8	1.8	1.7	-6%
Brazil	2.4	2.7	2.8	2.9	2.6	2.8	3.1	3.1	2.9	3.0	3.1	3%
Spain	3.9	3.3	3.1	3.4	3.1	3.0	3.1	2.7	2.8	2.6	2.5	-4%
Japan	3.1	3.4	3.1	3.0	2.9	3.0	3.1	2.9	2.9	2.8	2.6	-7%
Peru	2.3	2.4	2.6	3.1	3.3	2.7	3.3	3.1	3.0	3.3	3.3	0%
Kazakhstan	1.7	1.5	1.3	1.7	1.7	2.2	2.3	2.3	2.3	2.5	2.4	-4%
Argentina	2.3	3.0	3.4	2.7	2.2	2.5	2.3	2.1	2.0	2.0	2.4	20%
Italy	2.1	2.0	2.2	2.1	2.1	2.0	1.9	1.6	1.8	1.8	1.8	0%
Egypt	2.6	1.8	2.0	1.8	1.8	1.9	2.0	2.0	2.5	2.5	2.5	0%
Other Countries	46.5	45.4	46.4	50.3	50.5	51.8	51.5	51.3	54.4	56.6	53.0	-6%
World	311.8	303.4	300.8	301.1	329.1	312.9	317.4	315.0	330.7	324.5	315.1	-3%

Source: FAO

The FAO reported that world potato production was 315 million t in 2006 (which represents only a minute change from 2001, with little fluctuation between 2001 and 2006). China is the world's largest producer (70.3 million t) and has been for the period 2001-2006 with 22% of the world production followed by the Russian Federation (38.5 million t), India (23.9 million t), the United States (19.7 million t), Ukraine (19.5 million t) and Germany (10 million t). Since 2001 Canada's competitive position has stayed relatively constant with regards to rankings (13th in 2001), moving ahead of Poland in 2004 but still remaining out of the top ten with an average ranking of 12th. Note the rankings of the major potato producing countries have not changed much. China has increased production by 9% since 2001 but has remained the world's top producer throughout the 5 years. The Russian Federation has also increased production by 10% and has remained the world's second top producer throughout the 5 years.

Table 2-7 - World French Fry Situation*

Country	1996-1997	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	% Change**
Production ('000 of t)											
Canada	775	860	910	1,020	1,050	1,080	1,170	1,390	1,365	1,325	-3%
Netherlands	1,126	1,100	1,075	1,100	1,175	1,150	1,127	1,358	1,371	1,300	-5%
United States	3,382	3,284	3,566	3,498	4,331	3,750	3,838	3,752	3,857	3,999	4%
Imports ('000 of t)											
Canada	12	28	24	14	17	31	31	37	31	35	13%
Netherlands	56	46	65	85	105	75	83	155	105	115	10%
United States	249	339	368	465	533	651	673	827	780	650	-17%
Exports ('000 of t)											
Canada	345	448	516	619	634	736	768	1,015	979	970	-1%
Netherlands	970	950	965	930	1,030	990	1,011	1,385	1,184	1,140	-4%
United States	385	425	473	464	523	508	441	482	514	575	12%

*Frozen Potato Products by Marketing Year (July to June)

** % Change from 2004-2005 to 2005-2006

USDA, FAS

Canadian frozen French fry production was estimated at 1.325 million t in 2005-2006 and is down 3% from 2004-2005 reflecting the reduced volumes contracted by processors. This is the second consecutive decline in production over the previous years since the relentless expansion of the late 1980s. Approximately 55% of potatoes grown in Canada are used for processing. Of this, the largest percentage is used for French fries; 10 to 15% are used for chips and dehydration. It takes 2 to 2.5 kg of potatoes to produce 1 kg of French fries, about 5 kg for a kg of potato chips, and about 4 kg to produce 1 kg of dehydrated potatoes in granules. Of the three major exporting countries in 2005-2006, Canada ranks second after the Netherlands with 36% of the combined total exports of these countries while it ranks third in imports with only 4% of total imports.

VEGETABLE SECTOR

Table 3-1 - Number of Vegetable Farms and Area by Region (Excluding Greenhouse)

Province	1981	1986	1991	1996	2001	2006	2006/2001
Number of Farms							
Atlantic	1,393	1,215	1,105	1,208	937	842	-10%
Quebec	3,521	3,015	2,634	2,505	2,114	2,052	-3%
Ontario	6,202	5,290	4,486	4,622	3,938	3,909	-1%
Prairies	843	874	951	1,189	1,038	991	-5%
British Columbia	1,249	1,364	1,532	1,916	1,802	1,705	-5%
Canada	13,208	11,758	10,708	11,440	9,829	9,499	-3%
Area (ha)							
Atlantic	8,774	8,392	8,443	8,151	6,022	5,083	-16%
Quebec	32,544	32,804	36,575	40,313	43,501	42,223	-3%
Ontario	61,609	62,340	62,521	64,131	68,856	62,967	-9%
Prairies	6,422	5,467	6,779	7,987	8,194	7,951	-3%
British Columbia	7,867	7,570	8,276	7,115	7,277	6,957	-4%
Canada	117,216	116,573	122,594	127,697	133,851	125,181	-6%

Statistics Canada (Census of Agriculture)

The number of vegetable farms in Canada has decreased by 3% since 2001 from 9,829 to 9,499 and by 28% since 1981. Canada's total vegetable production acreage has decreased by 6% from 133,851 ha in 2001 to 125,181 ha in 2006 however acreage has actually increased by 6% from 1981 when 117,216 ha were in production.

With 3,909 vegetable farms and 62,967 ha, Ontario is the largest vegetable producer, a position it has held consistently since 1981. Since 2001 the number of vegetable farms in Ontario has decreased marginally by 1% from 3,938 to 3,909, however this number is 37% lower than what it was in 1981 (6,202). Ontario's acreage has also decreased by 9% from 68,856 ha in 2001 to 62,967 ha in 2006 (a 2% increase over an area of 61,609 ha in 1981).

Quebec has the second largest number of vegetable farms with 2,052 farms in 2006, down 3% from 2001 and 40% from 1981. Quebec also has the second largest acreage with 42,223 ha in 2006, down 3% from 43,501 ha in 2001 but up 30% from the 1981 area of 32,544 ha. British Columbia has the third largest number of farms with 1,705, down 5% from 2001 and up by 36% over 1981. There is an upward trend in the number of farms and acreage from 1981 in the prairie region where the number of farms has decreased by 5% since 2001 but has increased by 17% since 1981 and acreage has increased by 24%.

Table 3-2 - Vegetable Farm Cash Receipts¹

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Newfoundland	3.5	3.7	3.4	3.1	3.0	3.4	3.2	3.1	3.2	3.2	0%
Prince Edward Island	10.9	11.2	11.7	9.4	9.8	12.2	12.5	11.2	10.1	11.2	11%
Nova Scotia	16.2	15.0	15.3	15.9	16.3	16.7	15.9	15.2	15.4	15.4	0%
New Brunswick	7.1	6.3	6.9	6.5	6.0	5.1	6.0	5.2	5.9	5.6	-5%
Quebec	201.5	213.5	214.6	227.8	224.6	230.5	242.4	237.0	251.0	237.3	-5%
Ontario	362.2	359.5	367.6	403.2	418.0	435.2	434.7	432.9	442.0	431.3	-2%
Manitoba	25.2	28.0	27.8	32.5	31.6	26.9	25.8	29.1	39.0	33.5	-14%
Saskatchewan	2.3	2.0	1.7	2.6	1.2	1.1	1.0	1.0	1.2	0.7	-40%
Alberta	42.9	37.5	44.4	42.3	34.9	43.3	48.0	49.7	45.8	44.5	-3%
British Columbia	116.0	103.1	102.9	130.6	99.3	102.0	118.1	115.5	122.2	120.9	-1%
Canada	787.8	779.9	796.2	873.8	844.9	876.3	907.7	900.0	935.7	903.5	-3%

¹ Excludes greenhouse vegetables and potatoes

Statistics Canada (Table 002-0001, 21-001-X1B)

Farm cash receipts (FCR) for vegetable farms in Canada have been steady since 2003 with FCR in 2007 estimated at \$903.5 million, 3% lower than in 2006 but very close to the 5 year average of \$904.6 million. Ontario has the largest FCR with \$431.3 million or 48% of all national vegetable FCR's, followed by Quebec with \$237.3 million or 26% and British Columbia with \$120.9 million or 13%. The provinces that have experienced the most growth since 2003 were Manitoba (\$26.9 million to \$33.5 million, an increase of 25%) and British Columbia (\$102.0 million to \$120.9 million, an increase of 18%).

Table 3-3 - Major Field Vegetables Grown for the Fresh Market¹

Vegetable	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Carrots	61	56	X	X	47	46	X	X	50	54	8%
Lettuce	36	38	38	46	39	43	44	44	52	40	-23%
Cabbage	39	X	34	42	38	30	32	X	X	X	X
Dry Onions	51	48	45	48	35	41	39	47	57	55	-4%
Corn	36	32	27	31	33	31	31	31	41	35	-15%
Broccoli	26	24	X	X	26	28	37	X	X	X	X
Production ('000 t)											
Carrots	248	221	X	X	159	203	162	X	168	170	1%
Lettuce	84	81	64	88	78	74	77	77	70	64	-9%
Cabbage	152	X	143	134	106	113	129	X	X	X	X
Dry Onions	165	164	169	174	122	135	153	150	203	200	X
Corn	96	73	53	64	67	61	63	59	75	59	-21%
Broccoli	29	30	X	X	28	27	36	X	29	X	X

¹ Excludes greenhouse vegetables, mushrooms and potatoes

Statistics Canada/ Agriculture and Agri-Food Canada Fall Survey

Table 3-4 - Major Field Vegetables Grown for the Processing Market¹

Vegetable	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007*	07/06
Value (\$ Million)											
Tomatoes	59	57	X	50	62	53	59	60	60	61	2%
Corn	21	19	17	18	16	22	18	17	20	24	20%
Green Peas	20	19	20	20	14	21	19	14	16	18	13%
Cucumbers	13	17	18	16	18	17	17	12	8	8	0%
Carrots	8	9	X	X	10	11	7	X	17	14	-18%
Green & Wax Beans	8	10	11	8	9	11	11	10	10	9	-10%
Production ('000 t)											
Tomatoes	510	495	X	465	467	475	567	590	563	576	2%
Corn	253	230	208	226	203	263	201	192	205	226	10%
Green Peas	66	68	75	72	54	75	72	59	65	68	5%
Cucumbers	48	62	62	53	60	65	57	40	23	25	9%
Carrots	88	88	X	X	98	105	70	X	131	124	X
Green & Wax Beans	43	48	57	40	45	53	56	46	42	40	-5%

¹ Excludes greenhouse vegetables, mushrooms and potatoes

Statistics Canada/ Agriculture and Agri-Food Canada Fall Survey

Table 3-3 shows the major field grown vegetables destined for the fresh market of which onions and carrots top the list with respect to value. Onions have been strong performers as they have increased in value since 2005 from \$47 million to and \$55 million in 2007, a 17% increase over two years and a 15% increase over the 5 year average of \$47.8 million. Carrots have increased in value from \$46 million in 2003 to \$54 million in 2007, a 17% increase over the last 5 years. With respect to volume, carrot and onion production has been variable. Carrot production has increased 1% since 2006 but is 33,000 t lower than in 2003 and 3% lower than the 5 year average of 175,750 t. These fluctuations in value and production demonstrate the variability in price and yield.

According to Table 3-4, tomatoes and corn are the commodity leaders among vegetables grown for the processing market (canning, slicing, freezing, etc...). Tomato values have increased 2% since 2006 from \$60 million to \$61 million but have remained close to the 5 year average of \$58.6 million. Production in 2007 is estimated at 576,000 t, 2% higher than in 2006 but 3% below the 5 year average of 554,000 t. Corn has increased 20% in value from \$20 million in 2006 to \$24 million in 2007. The corn market has been variable since 2003, with the lowest values in 2005 at \$17 million and the highest in 2007 at \$24 million. The 2007 production value of 226,000 t is 4% higher than the 5 year average of 217,000 t.

When considering all vegetables produced in Canada the value has decreased by 2% from \$691.6 million in 2006 to \$673.5 million in 2007. The fresh market accounts for 75% of the value of production while the processed market absorbs the rest. The value of production of fresh market vegetables has decreased by 3% from \$530.5 million in 2006 to \$510.1 million in 2007 while the value of vegetables produced for the processing market has increased by 1% from \$161.1 million in 2006 to 163.3 million in 2007. The 2007 value for total vegetable production is 5% higher than the 5 year average of \$635.8 million while the value of vegetables for the fresh market is 10% higher than the 5 year average of \$460.1million and the value of vegetables destined for the processed market is 3% higher than the 5 year average of \$157.8 million.

Table 3-5 - Field Grown Vegetable Production (for Fresh and Processing Markets) by Province¹

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ Million)											
Atlantic	35.6	27.6	22.4	22.1	20.6	30.6	27.3	25.7	41.2	34.5	-16%
Quebec	197.0	207.4	199.2	205.4	202.1	219.3	238.7	238.8	257.0	255.2	-1%
Ontario	249.1	248.3	224.3	260.8	256.5	265.5	266.2	261.2	293.1	287.5	-2%
Prairies	27.3	18.9	24.3	25.2	11.7	33.4	37.4	38.5	50.5	43.3	-14%
British Columbia	49.8	48.8	44.7	50.6	44.7	47.2	48.4	42.6	49.8	53.0	6%
Canada	558.8	551.0	514.9	564.1	566.3	596.0	618.1	606.8	691.6	673.5	-3%
Cultivated Area ('000 ha)											
Atlantic	7.8	6.0	3.8	4.6	4.6	5.3	4.6	3.8	4.9	4.4	-9%
Quebec	40.6	39.0	40.2	43.1	39.6	39.9	40.8	38.9	40.9	39.2	-4%
Ontario	57.3	60.6	62.2	67.7	62.8	66.8	58.9	53.3	58.2	57.2	-2%
Prairies	7.2	5.8	6.0	6.2	5.7	7.7	8.1	7.6	8.0	7.2	-10%
British Columbia	5.9	5.9	6.1	6.9	6.1	6.1	6.2	5.2	6.7	6.4	-5%
Canada	118.8	117.3	118.3	128.5	120.5	125.8	118.6	108.7	118.7	114.4	-4%

¹ Excludes greenhouse vegetables, mushrooms and potatoes

Statistics Canada/ Agriculture and Agri-Food Canada Fall Survey

The Canadian vegetable marketed value, which is estimated at \$673 million in 2007, has decreased by 3% from 2006 (\$692 million) but has increased by 13% over the last 5 years (\$596 million in 2003). The 2007 national value is 5% higher than the 5 year average of \$637.2 million. Ontario has the highest value of production at \$287.5 million, followed by Québec at \$255.2 million. The Atlantic region accounts for \$34.5 million, the prairies for \$43.3 million and BC for \$53 million. The largest increase in value in 2007 was in BC at 6%, while the largest decreases were in the Atlantic region which had a 16% decline and in the Prairies which experienced a drop of 14%.

The cultivated area for vegetables in Canada has followed the trend seen in the number of farms and marketed value. Between 2006 and 2007 a 4% decrease was observed in the cultivated area from 118,700ha to 114,400 ha, with the 2007 area being 2% lower than the 5 year average of 117,200 ha. The regions with the largest fluctuations in cultivated area were the Atlantic region (-9% since 2006; -4% compared to the five year average of 4,600 ha) and the Prairies (-10% since 2006; -6% from the 5 year average of 7,700 ha).

Table 3-6 - Number of Farms and Greenhouses Reporting Certified Organic Fruit and Vegetable Production

2001		
Province	Number of Organic Fruit, Vegetable and Greenhouse	Percentage of all Certified Organic Farms in Province
Newfoundland & Labrador	3	100%
Prince Edward Island	17	74%
Nova Scotia	20	87%
New Brunswick	16	64%
Quebec	125	34%
Ontario	120	30%
Manitoba	7	8%
Saskatchewan	18	2%
Alberta	21	11%
British Columbia	267	84%
Canada	614	28%
2006		
Province	Number of Organic Fruit, Vegetable and Greenhouse	Percentage of all Certified Organic Farms in Province
Newfoundland & Labrador	4	100%
Prince Edward Island	24	77%
Nova Scotia	50	81%
New Brunswick	27	64%
Quebec	208	27%
Ontario	174	30%
Manitoba	21	11%
Saskatchewan	19	2%
Alberta	31	13%
British Columbia	358	80%
Canada	916	26%

Statistics Canada (Census of Agriculture)

Statistics Canada reports that the total number of certified organic farms producing fruits and vegetables in Canada in 2006 was 916, representing an increase of 49% compared to 2001 when there were only 614 certified organic farms. The province with the most organic fruit and vegetable farms is British Columbia with 358 or 39% of the total followed by Quebec with 208 farms or 23% and Ontario with 174 farms or 19%. An increase in awareness of the benefits of organic produce has positively affected the market translating into sales and production growth. This growth has also been positively affected by the implementation of mandatory certification to minimum organic standards through the new regulatory framework, boosting consumer confidence and demand for certified organic produce.

Table 3-7 - Canadian Mushroom Production by Region

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	06/05
Marketed Value (\$ Million)											
British Columbia	66.5	54.2	58.9	77.7	51.6	66.1	68.5	78.9	72.8	na	-8%
Prairies	31.2	34.1	39.4	36.3	34.2	44.2	38.5	37.8	26.8	na	-29%
Ontario	117.0	110.0	140.9	143.0	153.6	165.0	161.6	153.6	171.8	na	12%
Maritimes, Quebec	11.4	14.2	17.9	17.2	18.4	17.7	14.6	9.1	5.8	na	-36%
Canada	226.0	212.5	257.1	274.2	257.8	293.0	283.2	279.4	281.7	na	1%
Marketed Production ('000 t)											
British Columbia	23.0	22.2	21.1	27.7	14.2	23.0	22.9	25.9	23.9	na	-8%
Prairies	8.9	10.1	11.0	11.0	10.3	10.3	9.9	7.8	6.5	na	-17%
Ontario	37.8	33.3	43.6	42.9	45.6	49.2	48.2	44.1	46.1	na	5%
Maritimes, Quebec	3.3	3.8	4.7	4.8	5.1	5.6	3.6	2.3	1.5	na	-35%
Canada	73.0	69.4	80.4	86.4	75.1	88.0	84.7	80.1	78.0	na	-3%

na data not available

Statistics Canada (22-003-X1B)

Mushrooms have experienced significant growth in the past 10 years. In 2006, mushroom growers across Canada reported sales of \$281.7 million, almost 1% higher than the previous year but close to 25% higher than in 1998. A large portion of the sales (61.0%) came from operations in Ontario while British Columbia accounted for the second highest proportion of sales with almost 26% of the Canadian total. This growth can be largely attributed to better marketing and awareness of the health benefits of mushrooms, increased variety and availability of specialty mushrooms and a steady export market.

Table 3-8 - Canada's Ten Major Exported Fresh Vegetables

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Tomatoes (Field only since 2003)	153.0	180.2	244.3	263.2	274.2	0.6	1.2	0.7	0.7	0.2	-70%
Peppers (Field only since 2003)	50.4	56.9	74.2	101.4	113.8	9.7	7.3	8.4	9.0	9.2	2%
Mushrooms	40.3	55.2	62.5	79.6	94.2	98.9	109.5	102.5	89.0	91.5	3%
Cucumbers (Field only since 2003)	19.3	23.9	34.0	46.5	55.0	3.0	4.6	2.9	1.0	1.5	51%
Onions	25.1	20.1	22.1	37.2	37.3	36.1	32.8	29.4	39.6	47.4	20%
Carrots	28.8	28.6	24.3	33.6	28.9	28.6	30.9	32.7	41.3	37.2	-10%
Cabbage	17.8	16.3	19.2	22.7	22.3	18.6	20.2	24.8	20.6	21.5	4%
Lettuce (Field & GH)	7.6	10.9	18.8	20.7	16.6	16.4	17.2	20.4	24.2	22.8	-6%
Cauliflower & Headed Broccoli	8.0	4.7	5.0	4.8	4.9	5.5	9.4	4.3	5.2	7.9	53%
Celery	1.5	1.8	4.1	3.3	2.8	2.5	2.1	2.5	5.6	3.8	-32%
Canada - All Vegetables	363.8	411.5	521.2	630.3	674.6	749.9	813.2	802.4	841.5	784.2	-7%
Volume ('000 t)											
Tomatoes (Field only since 2003)	61.8	79.6	101.5	105.8	100.7	0.4	0.9	0.5	0.7	0.3	-56%
Peppers (Field only since 2003)	16.5	22.1	26.1	34.3	41.5	11.5	10.9	15.4	15.8	18.8	19%
Mushrooms	8.6	10.4	15.6	17.4	20.3	23.0	24.0	26.6	25.0	23.3	-7%
Cucumbers (Field only since 2003)	13.4	18.2	22.6	29.3	33.6	6.6	9.2	4.8	1.7	4.0	143%
Onions	47.9	35.1	36.8	59.8	57.4	54.8	61.3	58.2	63.2	75.9	20%
Carrots	63.7	58.3	57.6	67.4	60.0	67.4	72.5	64.5	80.2	73.1	-9%
Cabbage	36.3	36.2	39.2	40.0	37.7	36.7	42.6	46.8	43.4	45.7	5%
Lettuce (Field & GH)	11.2	13.4	18.6	22.6	18.3	19.3	21.3	22.2	23.6	25.6	9%
Cauliflower & Headed Broccoli	11.0	6.8	6.9	6.1	6.0	7.2	12.3	6.1	7.0	10.6	53%
Celery	3.5	3.5	6.7	6.2	5.8	5.5	5.7	5.6	9.0	8.9	-2%
Canada - All Vegetables	286.2	298.2	346.4	406.4	402.8	461.0	508.1	507.2	531.2	533.1	0%

1998-2002 data includes both field and greenhouse(GH) for tomatoes, peppers and cucumbers

Statistics Canada

Canadians are continuously improving production methods, product quality and marketing efforts resulting in a steady export market in recent years and a ten year trend of impressive growth (export value up by 115% since 1998). According to Statistics Canada (see table above) exports of vegetables reached \$784.2 million in 2007 down 7% from 2006 (\$841.5 million) and up 115 % from 1998 (\$363.8 million). The recent drop in exports is in part due to the strengthening of the Canadian dollar which makes our exports to our major trading partner the United States relatively more expensive.

Table 3-9 - Canada's Exports of Fresh Vegetables to Top Five Countries*

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
United States	341.4	391.8	507.8	611.4	659.9	732.7	783.0	787.4	832.9	763.0	-8%
Japan	10.7	13.5	8.2	12.3	9.9	10.8	20.1	7.3	3.8	10.5	178%
France	1.3	0.9	1.0	1.2	1.3	1.7	3.5	1.7	0.3	2.1	672%
Trinidad-Tobago	0.4	0.1	0.1	0.3	0.3	0.4	0.7	0.9	0.7	0.3	-57%
Netherlands	0.3	0.2	0.3	0.1	0.2	0.3	0.6	0.6	0.2	0.9	278%
Total All countries	363.8	411.5	521.2	630.3	674.6	749.9	813.2	802.4	841.5	784.2	-7%
Volume ('000 t)											
United States	267.86	289.80	340.56	398.19	397.67	453.93	498.32	497.71	522.47	519.68	-1%
Japan	0.37	0.51	0.29	0.60	0.45	0.93	1.36	0.89	0.95	1.34	42%
France	0.15	0.05	0.05	0.14	0.11	0.15	0.23	0.14	0.01	0.73	5531%
Trinidad-Tobago	0.82	0.10	0.14	0.59	0.60	0.97	1.48	1.72	1.46	0.92	-37%
Netherlands	0.03	0.03	0.03	0.05	0.01	0.11	0.07	0.04	0.01	0.54	5270%
Total All countries	286.20	298.20	346.40	406.40	402.80	461.04	508.08	507.20	531.21	533.10	0%

*Ranking based on total of last 4 years; Excludes potatoes;

Statistics Canada

Table 3-10 - Canada's Ten Major Imported Fresh Vegetables

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Lettuce (Field & GH)	188.0	184.6	222.1	229.4	276.8	278.0	274.7	327.3	356.8	362.9	2%
Tomatoes (Field & GH)	200.5	179.1	209.3	216.3	231.7	235.5	257.2	243.6	258.2	285.5	11%
Melons	136.9	139.5	140.3	161.5	171.7	167.4	158.3	183.4	180.2	194.6	8%
Peppers (Field & GH)	112.5	115.0	136.8	160.1	161.1	169.9	182.8	181.6	169.7	191.4	13%
Carrots	71.6	80.6	84.7	102.1	113.0	110.9	107.0	107.0	108.4	121.9	13%
Onions	72.9	70.2	67.3	86.0	90.1	108.2	91.7	97.2	95.1	123.7	30%
Broccoli	66.1	60.4	73.1	70.4	83.2	73.0	73.2	71.2	73.9	78.0	5%
Celery	40.9	39.1	58.9	54.1	52.9	45.5	51.6	48.8	48.1	56.5	17%
Cauliflower & Headed Broccoli	37.3	38.6	44.1	44.1	51.9	54.3	53.9	54.4	52.9	53.5	1%
Cucumbers & Gherkins (Field & GH)	32.8	32.1	35.0	40.5	41.8	40.3	40.3	42.1	49.0	58.1	18%
All Vegetables	1,271.0	1,262.0	1,424.6	1,554.6	1,699.4	1,704.5	1,723.6	1,820.6	1,862.4	1,728.0	-7%
Volume ('000 t)											
Lettuce (Field & GH)	259.7	265.9	279.9	282.8	323.2	324.1	310.5	315.9	310.0	305.2	-2%
Tomatoes (Field & GH)	156.4	162.4	172.7	172.7	165.7	165.8	173.7	171.5	181.5	196.4	8%
Melons	246.5	279.4	275.5	261.8	308.2	332.5	357.3	346.1	360.9	370.4	3%
Peppers (Field & GH)	71.7	78.1	85.7	90.4	93.3	95.4	95.7	102.5	107.8	107.8	0%
Carrots	101.2	109.8	110.1	120.3	140.9	132.3	110.4	107.5	112.8	120.4	7%
Onions	118.4	134.2	123.7	141.9	152.5	164.7	150.5	154.6	149.4	154.8	4%
Broccoli	76.1	77.6	75.5	76.0	78.6	70.4	72.4	73.7	76.0	77.1	1%
Celery	87.8	87.0	86.0	85.8	90.8	93.8	97.3	96.0	94.0	92.5	-2%
Cauliflower & Headed Broccoli	38.4	40.9	46.4	46.5	52.6	53.8	58.3	60.9	61.2	62.7	2%
Cucumbers & Gherkins (Field & GH)	32.0	36.5	38.9	40.7	41.3	41.8	42.4	42.4	47.0	49.1	4%
All Vegetables	1,460.2	1,546.5	1,600.5	1,640.3	1,781.9	1,819.9	1,830.9	1,835.9	1,863.0	1,628.4	-13%

GH - Greenhouse Vegetables

Statistics Canada

Due to the largely seasonal nature of vegetable production, Canada has traditionally been a net importer of vegetables. In 2007 Canada had a net trade deficit in vegetables with imports exceeding exports in value by

\$943.8 million. The value of imports of all vegetables in 2007 was 7% lower than in 2006 and 2% below the 5 year average of \$1,767.8 million. With respect to major imported vegetables such as lettuce and tomatoes, the overall trend shows an increase in both value and volume. Lettuce is Canada's top imported vegetable product, with \$362.9 million imported in 2007 (down 2% from 2006 but up 13% from the 5 year average of \$320 million). Tomatoes ranked second in terms of imported value with melons and peppers following closely behind.

Table 3-11 - Canada's Imports of Fresh Vegetables from Top Five Countries*

Country	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
United States	1,024.5	1,032.4	1,176.5	1,255.8	1,332.0	1,289.4	1,272.5	1,342.3	1,332.6	1,232.6	-8%
Mexico	140.3	119.9	129.0	158.7	207.0	244.6	260.3	285.3	321.4	222.4	-31%
Netherlands	16.5	17.9	24.3	28.5	25.9	26.6	28.9	27.4	27.0	3.9	-86%
Guatemala	8.7	13.1	14.3	15.8	19.5	23.0	22.6	24.2	24.2	28.4	17%
Spain	22.3	16.9	21.1	20.7	23.9	21.0	25.6	16.7	22.4	2.1	-91%
Total All countries	1,271.0	1,262.0	1,424.6	1,554.6	1,699.4	1,704.5	1,723.6	1,820.6	1,862.4	1,728.0	-7%
Volume ('000 t)											
United States	1,254.2	1,344.0	1,392.5	1,429.8	1,508.8	1,498.2	1,497.7	1,469.7	1,450.8	1,175.7	-19%
Mexico	133.5	122.9	123.6	124.9	162.1	194.2	198.1	219.1	253.0	171.6	-32%
Netherlands	7.5	5.7	7.9	7.7	9.0	11.2	10.0	10.0	8.9	1.5	-84%
Guatemala	8.3	15.8	14.6	13.8	19.3	25.0	22.5	27.2	30.8	34.3	11%
Spain	9.0	7.2	7.9	7.5	9.9	8.1	9.5	9.2	9.9	1.0	-90%
Total All countries	1,460.2	1,546.5	1,600.5	1,640.3	1,781.9	1,819.9	1,830.9	1,835.9	1,863.0	1,628.4	-13%

*Ranking based on total of last 4 years; Excludes potatoes;

Statistics Canada

Table 3-12 - Consumption of Fresh Vegetables in Canada (adjusted for losses)

Fresh Vegetables	1996	2001	2002	2003	2004	2005	2006
kilograms per person							
Artichokes	0.02	0.02	0.02	0.02	0.01	0.02	0.01
Asparagus	0.08	0.14	0.15	0.17	0.17	0.2	0.22
Beans green and wax	0.45	0.49	0.56	0.58	0.68	0.55	0.61
Beets	0.18	0.23	0.21	0.2	0.2	0.19	0.28
Broccoli	1.4	1.35	1.34	1.22	1.34	1.32	1.27
Brussels sprouts	0.11	0.11	0.1	0.09	0.1	0.08	0.09
Chinese cabbage	0.37	0.35	0.42	0.39	0.38	0.4	0.42
Cabbage	3.01	2.71	2.74	2.32	2.91	2.7	2.62
Carrots	5.46	5.43	4.81	5.23	3.99	4.59	4.39
Cauliflower	0.59	0.64	0.59	0.59	0.57	0.62	0.62
Celery	2.39	2.17	2.33	2.29	2.38	2.19	2.11
Corn	0.84	0.66	0.69	0.68	0.75	0.76	0.68
Cucumbers	1.66	2.14	1.72	1.58	1.75	2.04	2.08
Other edible roots	0.15	0.11	0.13	0.15	0.14	0.13	0.16
Eggplants	0.17	0.21	0.21	0.22	0.22	0.22	0.23
Garlic	0.21	0.22	0.22	0.22	0.23	0.21	0.21
Kohlrabi	0.06	0.09	0.12	0.12	0.1	0.11	0.11
Leeks	0.11	0.13	0.14	0.13	0.12	0.12	0.13
Other leguminous vegetables	0.02	0.01	0.01	0.01	0	0	0
Lettuce	5.38	6.4	6.71	6.57	6.3	6.35	6.06
Manioc	0.03	0.03	0.03	0.03	0.04	0.03	0.04
Mushrooms	0.98	1.14	0.77	0.96	0.91	0.88	0.89
Okra	0.03	0.05	0.05	0.05	0.06	0.06	0.06
Olives	0.01	0.01	0.01	0.01	0.01	0.01	0.01
Onions and shallots	4.29	4.37	4.1	3.88	3.76	4.29	4.17
Parsley	0.1	0.14	0.13	0.12	0.12	0.11	0.13
Parsnips	0.09	0.08	0.06	0.07	0.06	0.06	0.07
Peas	0.12	0.15	0.14	0.14	0.15	0.16	0.2
Peppers	1.85	1.88	1.95	1.94	2.05	2.27	2.25
Potatoes sweet	0.19	0.28	0.28	0.3	0.34	0.34	0.35
Potatoes white	33.77	33.8	31.65	30.93	29.61	29.11	28.78
Pumpkins and squash	0.96	1.28	1.05	1.2	1.27	1.31	1.25
Radishes	0.35	0.31	0.34	0.4	0.35	0.31	0.36
Rappini	0.07	0.08	0.08	0.08	0.08	0.08	0.08
Rutabagas and turnips	0.94	0.67	0.71	0.58	0.55	0.69	0.45
Spinach	0.25	0.42	0.46	0.45	0.41	0.32	0.27
Tomatoes	4.72	5.4	5.31	4.75	4.88	4.63	4.6
Unspecified fresh vegetables	0.77	0.72	0.89	1.41	0.7	0.77	0.68
Total fresh vegetables	71.78	74.08	70.81	69.68	67.32	67.85	66.55

Source: Statistics Canada, 21-020-XIE, Table 4-12

According to Statistics Canada, the consumption of vegetables has been steady since 2002. Canadians consumed 66.55 kg of fresh vegetables per capita in 2006, which was 2% lower than the 2005 consumption of 67.85kg and 2.7% lower than the 5 year average of 68.4kg. Potatoes (28.78 kg/person or 43% of total consumption), lettuce (6.06kg/person or 9% of total consumption), tomatoes (4.60kg/person or 7% of total consumption) and onions (4.17kg/person or 6% of total consumption) are the most consumed vegetables. The top performing vegetables which have experienced increases in consumption are cucumbers with a steady increase of 21% since 2002 from 1.72kg/person to 2.08kg/person and peppers with a steady increase of 15% since 2002 from 1.95 kg/person to 2.25 kg/person.

This steady market may be explained in part by healthy eating trends amongst consumers, increased marketing and awareness of the benefits of vegetable consumption, changing demographics and improved packaging for children and convenience, to name a few factors.

GREENHOUSE SECTOR

Table 4-1 - Greenhouse Vegetable Farm Cash Receipts

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Newfoundland	0.0	0.0	0.0	0.0	0.3	0.2	0.2	0.2	0.2	0.2	0%
Prince Edward Island	0.5	0.4	0.5	0.4	0.5	0.4	0.3	X	0.3	0.3	0%
Nova Scotia	4.7	4.9	4.7	4.1	4.5	6.2	4.5	4.0	4.5	4.5	0%
New Brunswick	0.9	1.1	1.0	0.6	0.7	0.7	0.5	X	0.4	0.4	0%
Quebec	44.6	42.7	44.6	58.3	53.6	54.2	56.8	54.0	58.7	57.9	-1%
Ontario	217.7	248.7	296.4	338.4	327.2	322.2	372.4	396.6	426.2	418.2	-2%
Manitoba	0.2	0.1	0.5	0.3	0.3	0.4	0.3	0.2	0.3	0.3	0%
Saskatchewan	0.6	0.6	0.7	0.6	0.8	0.7	0.7	0.6	0.7	0.7	0%
Alberta	17.6	16.2	19.3	23.1	25.7	25.9	29.8	31.2	30.5	32.2	6%
British Columbia	90.0	123.7	136.9	163.8	180.2	226.2	251.1	224.4	236.5	201.6	-15%
Canada	376.9	438.5	504.7	589.7	593.8	637.1	716.7	711.0	758.3	716.3	-6%

Statistics Canada (Table 002-0001, 21-001-X1B)

According to Statistics Canada, the 2007 farm cash receipts (FCR) for greenhouse vegetables fell to \$ 716.3 million from \$ 758.3 million a year earlier, representing a 6% drop. Increased competition, in particular from Mexico, and the higher value of the Canadian dollar versus the U.S. currency were the major reasons for this decline. The main greenhouse vegetable producing provinces were Ontario with FCR of \$418.2 million (down 2% from 2006) and British Columbia with FCR of \$201.6 million (15% lower than in 2006). In Quebec, FCR for greenhouse vegetables were down by 1% in 2007 to \$57.9 million, while FCR in Alberta were up by 6% to \$32.2 million and in Nova Scotia FCR for greenhouse vegetables were unchanged at \$4.5 million.

Table 4-2 - Canadian Greenhouse Vegetable Production and Value

Product	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Value (\$ Million)										
Tomatoes	214	256	288	350	381	378	413	385	407	6%
Cucumbers	107	117	130	145	111	119	132	137	191	40%
Peppers	34	43	61	65	79	106	137	166	192	16%
Lettuce	13	13	15	25	16	16	17	20	25	24%
Total	368	429	494	584	586	619	699	708	815	15%
Production ('000 t)										
Tomatoes	116	158	182	208	216	216	224	210	214	2%
Cucumbers	82	90	101	116	92	92	114	136	179	31%
Peppers	10	12	18	21	25	30	41	51	59	15%
Lettuce	13	15	16	24	11	11	11	13	14	5%
Total	221	274	316	369	344	349	389	411	466	13%
Area (ha)										
Tomatoes	303	360	400	441	445	444	453	431	474	10%
Cucumbers	155	162	182	194	201	187	207	224	272	22%
Peppers	44	65	98	96	108	126	185	215	256	19%
Lettuce	14	15	16	24	14	13	15	9	8	-14%
Total	516	602	696	755	768	770	860	879	1,010	15%

2007 data not available

Statistics Canada (22-202-X1B)

Table 4-3 – Greenhouse Vegetable Exports to the U.S.

Product	2003	2004	2005	2006	2007	07/06
Value (\$ Million)						
Tomatoes	322.6	341.1	332.8	322.6	253.7	-21%
Cucumbers	61.3	74.9	75.5	89.1	85.9	-4%
Peppers	114.3	128.3	134.4	162.3	171.1	5%
Canada	498.2	544.2	542.7	574.0	510.7	-11%
Volume ('000 t)						
Tomatoes	129.8	132.9	141.1	134.4	111.4	-17%
Cucumbers	35.8	44.8	44.0	47.2	48.5	3%
Peppers	34.8	37.8	40.7	45.1	51.0	13%
Canada	200.4	215.5	225.9	226.7	210.9	-7%

Prior to 2003, greenhouse and field combined

The 2007 export value for the 3 major greenhouse crops (tomatoes, cucumbers, peppers) to the U.S. was down by 11 percent to \$510.7 million. This is mostly due to the higher value of the Canadian dollar versus the U.S. currency. The combined volume of exports of these 3 products to the U.S. was almost 211,000 MT in 2007, down by 7% from 2006, but only slightly lower than the 5 year average of 216,000 MT. Tomato exports showed a 21% decrease in volume in 2007, due to a significant increase in Mexico's exports to the U.S. at reportedly lower prices. In contrast, exports of cucumbers and peppers increased by 3% and 13% respectively to reach 48,500 MT and 51,000 MT in 2007.

FRUIT SECTOR

Table 5-1 - Number of Fruit, Berry and Nut Farms and Area by Region

Province	1996	2001	2006	2006/2001
Number of Farms				
Fruits, berries and nuts				
Maritimes	2,036	1,872	1,959	5%
Quebec	2,507	1,883	2,013	7%
Ontario	5,203	3,247	3,093	-5%
Prairies	1,333	1,168	1,208	3%
British Columbia	5,232	4,004	4,174	4%
Canada	16,311	12,174	12,447	2%
Area (ha)				
Fruits, berries and nuts				
Maritimes	26,759	31,944	33,844	6%
Quebec	23,828	24,515	28,244	15%
Ontario	28,597	26,335	25,780	-2%
Prairies	1,690	2,152	2,380	11%
British Columbia	18,316	19,567	19,822	1%
Canada	99,190	104,513	110,070	5%

Statistics Canada (Census of Agriculture)

According to the 2006 census of agriculture data, the area devoted to fruit production climbed 5.3% between the 2001 and 2006 censuses to reach 110,070 hectares (271,986 acres). This increase is in large part due to the significant growth in blueberry and grape plantings that have occurred in the last few years.

With 51,304 ha (126,775 acres) devoted to blueberry production in 2006 blueberries accounted for 46.6% of the total fruit acreage. Quebec's 24.5 % increase in blueberry area to 16,898 ha (41,757 acres) has placed this province in the first place in terms of acreage for production of low-bush blueberry, ahead of Nova Scotia with 15,635 ha (38,634 acres) and New Brunswick with 8,946 ha (22,107 acres), while British Columbia which is Canada's main producer of high-bush blueberry, had the most significant increase in blueberry area, growing by 61.5% to reach 4,775 ha (11,800 acres) in 2006.

The success of Canadian wineries in the last few years has contributed to building Canada's reputation for producing some internationally recognized wines and has also led to an increase in acreage devoted to grape production, which went up by 14.9% between 2001 and 2006, to reach 12,164 ha (30,059 acres) in 2006. Although Ontario and British Columbia remain the major wine producing provinces, the Maritimes and Quebec boasted the largest percent increases in grape area between 2001 and 2006 with Quebec more than doubling its grape area from 221 ha (546 acres) in 2001 to 445 ha (1,100 acres) in 2006.

Canadian cranberry area increased by 13.2% between 2001 and 2006 to reach 3,415 ha (8,438 acres), as a result of the strong market demand the cranberry industry has been enjoying over this period. Most of the expansion occurred in Quebec (total area up by 27.6%) and in the Maritimes (increases of 86% in Nova Scotia, 44.2% in PEI and 15.7% in New Brunswick), while the total cranberry area in BC remained almost unchanged at 1,638 ha (4,048 acres).

In contrast to the blueberry, cranberry and grape sectors, areas devoted to apple and tender fruit production have both declined between 2001 and 2006 and appear to be on a long term downward trend. Total planted area devoted to apples dropped by 3,724 ha (9,202 acres) between 2001 and 2006 to reach 22,101 ha (54,612 acres) in 2006.

According to the 2006 census of agriculture, Canadian strawberry and raspberry areas also declined between the last 2 censuses, falling by 13.3% to 5,204 ha (12,861 acres) for strawberries and by 5.2% to 3,635 ha (8,982 acres) for raspberries. A contributing factor to the decline in Canadian strawberry area is the fact that strawberries are now shipped into Canada from warmer climates and are available year-round in grocery stores, putting competitive pressure on the domestic production which remains seasonal. The drop in raspberry area is mainly due to the increasingly competitive market environment which has led to declining prices over the last few years.

Table 5-2 - Fruit Farm Cash Receipts¹

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Newfoundland	1.0	0.6	0.9	0.8	0.9	0.6	0.7	0.7	0.6	0.8	30%
Prince Edward Island	3.1	4.9	4.9	3.4	3.0	4.3	5.5	6.2	5.9	7.1	21%
Nova Scotia	33.6	47.4	45.7	30.5	34.8	42.2	36.9	42.1	40.6	38.2	-6%
New Brunswick	12.1	15.3	14.8	12.4	12.8	17.6	16.8	21.7	18.1	19.2	6%
Quebec	71.2	106.7	95.5	97.1	88.6	94.9	107.2	106.3	117.6	114.2	-3%
Ontario	204.3	224.1	217.7	225.7	194.7	157.7	176.5	146.0	192.1	184.8	-4%
Manitoba	1.9	1.9	2.2	2.9	2.3	1.6	1.6	1.3	1.8	1.8	0%
Saskatchewan	1.0	1.2	1.8	1.7	2.2	1.5	1.3	1.6	1.5	1.3	-11%
Alberta	4.4	3.2	2.5	2.4	2.7	2.1	2.5	1.8	1.8	1.8	0%
British Columbia	153.4	167.1	160.6	154.3	174.8	217.4	235.7	223.9	212.5	233.6	10%
Canada	486.2	572.6	546.7	531.6	517.0	540.2	584.7	551.7	592.5	602.8	2%

¹ Apples, other tree fruit, strawberries, other berries and grapes

Statistics Canada (Table 002-0001, 21-001-X1B)

Fruit farm cash receipts reached almost \$ 603 million in 2007, representing a 2% increase compared to 2006 while 5% higher than the 5-year average, continuing an upward trend over the last 5 years. British Columbia continues to rank as the number one province with the highest farm cash receipts (\$ 233.6 million), followed by Ontario (\$184.8 million), Quebec (\$ 114.2 million), Nova Scotia (\$38.2 million), New Brunswick (\$ 19.2 million) and Prince Edward Island (\$7.1 million).

Table 5-3 - Canadian Apple Production (for Fresh and Processing Markets)

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ Million)											
Nova Scotia	12.7	12.6	12.7	8.0	12.0	9.0	8.8	9.9	10.5	11.8	12%
New Brunswick	2.0	2.1	2.3	2.2	3.1	1.8	2.5	2.2	1.5	1.7	13%
Quebec	22.7	37.1	31.9	23.4	36.0	25.9	28.2	29.2	34.7	34.5	-1%
Ontario	85.3	101.5	97.2	97.4	56.2	55.0	48.9	60.5	62.2	75.0	21%
British Columbia	37.1	47.5	39.2	34.9	49.4	61.0	34.6	36.7	38.5	40.4	5%
Canada	160.0	201.1	183.7	166.3	157.1	153.0	123.2	138.7	147.6	163.7	11%
Marketed Volume ('000 t)											
Nova Scotia	42.3	46.0	41.2	35.4	40.8	36.3	31.0	39.4	39.0	41.1	5%
New Brunswick	3.6	4.4	5.1	3.8	4.7	4.6	5.0	4.6	4.1	3.6	-12%
Quebec	66.5	118.4	89.3	71.5	87.2	66.8	78.9	78.2	87.7	99.8	14%
Ontario	229.0	331.3	262.9	241.5	115.7	145.2	142.4	168.7	154.7	183.7	19%
British Columbia	178.5	120.8	131.2	114.0	133.1	126.1	122.8	117.4	90.7	76.7	-15%
Canada	520.4	621.4	530.3	466.6	381.9	379.2	380.6	408.6	376.5	405.1	8%
Total Volume ('000 t)											
Nova Scotia	42.3	46.0	41.7	35.4	40.8	36.3	33.4	39.4	39.5	41.3	5%
New Brunswick	3.6	4.8	5.1	4.0	5.0	4.6	5.0	4.7	4.4	4.0	-9%
Quebec	70.9	119.0	89.6	71.5	87.7	98.3	87.1	81.6	88.2	113.4	29%
Ontario	229.0	331.3	262.9	241.5	115.7	145.2	142.4	168.7	154.7	190.5	23%
British Columbia	178.5	132.7	131.2	129.7	135.6	131.5	128.4	122.9	90.7	78.5	-13%
Canada	524.7	634.3	531.1	482.5	385.2	416.2	396.8	417.7	377.6	428.0	13%
Bearing Area (ha)											
Nova Scotia	2,752	2,630	2,388	2,307	2,226	2,266	2,185	2,185	2,266	2,226	-2%
New Brunswick	405	344	344	356	354	360	384	344	281	231	-18%
Quebec	7,244	6,920	6,677	5,949	5,706	6,111	5,868	5,564	5,059	4,978	-2%
Ontario	10,239	10,117	9,308	8,498	6,880	7,284	7,042	7,001	7,284	6,880	-6%
British Columbia	6,212	6,070	5,483	5,342	5,342	5,504	5,261	3,925	3,521	3,318	-6%
Canada	26,934	26,165	24,277	22,531	20,584	21,600	20,815	19,087	18,486	17,705	-4%
Bearing and Non-Bearing Area (ha)											
Nova Scotia	2,914	2,833	2,752	2,630	2,550	2,550	2,469	2,388	2,428	2,469	2%
New Brunswick	486	465	439	416	413	445	405	364	324	304	-6%
Quebec	7,689	7,284	7,122	6,843	6,677	6,677	6,637	6,515	6,475	6,273	-3%
Ontario	11,534	11,331	10,522	9,814	8,903	8,903	7,608	7,568	8,094	7,689	-5%
British Columbia	7,244	6,475	5,969	5,982	5,868	5,868	5,666	4,654	4,371	4,047	-7%
Canada	29,979	28,502	26,918	25,799	24,522	24,552	22,889	21,586	21,813	20,892	-4%

Statistics Canada (22-003-X1B)

The 2007 Canadian apple crop is estimated at 428,000 t, representing a 13% increase compared to 2006, thanks mainly to an unexpected increase in the size of the crop in Quebec (up by 29%) and in Ontario (up by 23%). The 2007 crop is the largest crop in the last 5 years and is 5% higher than the 5-year average of 407,300 t. With an estimated production of 190,509 t in 2007, Ontario remains the largest apple producing province (45% of Canadian apple production), followed by Quebec with 113,398 t (26%), British Columbia with 78,471 t (18%), Nova Scotia with 41,277 t (10%) and New Brunswick with 4,028 t (1%).

Total cultivated area for apples is estimated at 20,892 ha (51,625 acres) for 2007, which is 4% lower than in 2006 and 6.5% below the 5-year average. The acreage devoted to apple production has been on a downward trend over the last few years primarily due to a switch to other tree fruits and as a result of the adoption of high density apple plantings in an attempt to replace old apple varieties with newer varieties that are more in demand by consumers.

Table 5-4 - Storage Holdings of Apples by Province

Province	2005-2006			2006-2007			% Change*		
	Nov. 1	Feb. 1	Jul. 1	Nov. 1	Feb. 1	Jul. 1	Nov. 1	Feb. 1	Jul. 1
Volume (t)									
Nova Scotia-New Brunswick-PEI	20,112	17,866	4,146	17,103	14,890	3,518	-15%	-17%	-15%
Quebec	53,407	37,240	9,201	44,806	30,398	9,863	-16%	-18%	7%
Ontario	89,508	50,807**	8,296	41,291	41,584	6,051	-54%	-18%	-27%
British Columbia	72,731	X	4,012	51,160	31,919	3,245	-30%	X	-19%
Canada	235,758	105,913	25,655	154,360	118,791	22,677	-35%	12%	-12%

* % Change from 2005-2006 to 2006-2007

** Excludes Data for Hamilton and Niagara Regions (NA)

InfoHort (Horticulture Markets Information Website)

As of July 01, 2007 (last storage report for the 2006-2007 marketing year) total Canadian apple storage holdings stood at 50 million pounds (22,677 t), a 12% decrease from the 56.6 million pounds (25,655 t) in storage the previous year at the same time. With US apple supplies from the 2006 crop below five-year average levels as of July 01, 2007, apple prices were set to start the 2007-2008 marketing year on a strong footing.

Table 5-5 - Exports of Fresh Apples by Province (August to July)

Province	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change *
Value (\$ '000)											
Nova Scotia	586	749	561	1,169	1,559	2,461	1,411	1,444	1,903	2,390	26%
New Brunswick	14	85	11	121	43	100	0	0	0	0	0%
Quebec	4,692	5,576	5,355	4,940	6,614	7,722	3,776	3,886	4,270	4,246	-1%
Ontario	13,605	11,911	18,434	12,788	10,287	10,213	8,085	9,440	9,993	4,709	-53%
British Columbia	25,044	36,061	30,323	34,045	33,566	40,820	27,072	24,089	27,554	26,317	-4%
Canada	43,970	54,407	54,731	53,088	52,077	61,395	40,354	38,898	43,722	37,663	-14%
Volume (t)											
Nova Scotia	873	1,205	597	1,170	1,541	3,293	1,079	1,380	1,853	1,737	-6%
New Brunswick	9	110	21	174	57	116	0	0	0	0	0%
Quebec	9,211	7,906	8,780	6,724	8,562	6,581	3,968	4,816	4,999	4,288	-14%
Ontario	31,597	16,095	29,656	16,748	14,570	14,469	11,147	12,766	16,595	8,202	-51%
British Columbia	32,866	41,832	28,360	39,321	33,803	36,754	25,443	29,338	31,464	21,623	-31%
Canada	74,589	67,167	67,465	64,181	58,541	61,271	41,675	48,406	54,914	35,851	-35%

* % Change from 2005-2006 to 2006-2007

Statistics Canada

Table 5-6 - Exports of Fresh Apples to Major Countries (August to July)

Countries	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change *
Value (\$ '000)											
United States	29,384	31,822	35,704	32,167	34,292	44,255	29,248	23,926	29,214	29,244	0%
United Kingdom	5,180	6,029	9,701	6,957	6,515	5,051	4,813	6,153	5,224	2,593	-50%
Mexico	1,614	2,797	2,544	2,861	3,114	7,124	3,461	3,426	4,858	2,601	-46%
Taiwan	525	1,639	48	80	273	266	418	2,201	760	643	0%
Iceland	125	149	97	142	193	49	1,506	315	396	564	42%
Costa Rica	11	9	86	487	260	1,083	317	502	888	509	-43%
Other Countries	7,131	11,961	6,550	10,394	7,430	3,567	591	2,375	2,381	1,509	-37%
Total	43,970	54,407	54,731	53,088	52,077	61,395	40,354	38,898	43,722	37,663	-14%
Volume (t)											
United States	57,345	37,561	46,688	38,703	38,463	45,104	30,698	30,533	37,813	27,613	-27%
United Kingdom	5,619	5,694	10,033	7,084	6,916	3,864	4,247	5,298	4,952	2,337	-53%
Mexico	2,011	4,542	2,958	4,757	3,933	7,036	3,717	4,908	6,594	2,896	-56%
Taiwan	502	1,445	51	85	241	214	320	4,281	705	567	-20%
Iceland	115	193	97	142	183	39	1,649	315	374	479	28%
Costa Rica	21	2	136	660	434	1,251	393	669	1,141	508	-55%
Other Countries	8,976	17,730	7,501	12,751	8,372	3,763	651	2,403	3,335	1,451	-56%
Total	74,589	67,167	67,465	64,181	58,541	61,271	41,675	48,406	54,914	35,851	-35%

* % Change from 2005-2006 to 2006-2007

Statistics Canada

Canadian exports of fresh apples reached 35,851 t for the 2006-2007 marketing year, representing a 35% decline from the previous year and 26% below the 5-year average. This decline in exports is due in part to the rapid appreciation of the Canadian dollar against the U.S. dollar (from 83 cents U.S. in August 2005 to 95 cents U.S. in July 2007), but also due to the increasingly competitive environment in which the Canadian apple industry operates, with pressures in the marketplace due to world oversupply, retailer consolidation, and increased foreign competition in both domestic and export markets.

The U.S., which absorbed 77% of our apple exports in 2006-2007, is still the major export market for Canadian apples, followed by Mexico (8%) and the United Kingdom (7%).

The estimated value of Canadian apple exports was \$37.7 million in 2006-2007, representing a 14% decrease compared to the previous year and 15% below the 5-year average.

Table 5-7 - Imports of Fresh Apples to or through Provinces (August to July)

Province	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change *
Value (\$ '000)											
Nova Scotia	0	219	184	124	148	264	130	369	43	305	603%
New Brunswick	2,331	2,378	2,020	1,417	1,689	1,014	817	305	356	1,536	331%
Quebec	15,530	14,821	10,905	14,252	14,311	17,858	19,556	15,797	17,369	21,605	24%
Ontario	66,007	63,427	57,807	65,391	75,878	86,643	84,115	75,167	79,241	103,855	31%
British Columbia	46,445	41,270	44,617	43,703	53,216	64,650	60,397	48,560	50,423	57,689	14%
Other Provinces	3,439	2,254	2,181	2,304	2,622	2,555	2,601	2,029	2,365	3,529	49%
Canada	133,752	124,368	117,714	127,191	147,864	172,984	167,615	142,227	149,797	188,519	26%
Volume (t)											
Nova Scotia	0	175	174	109	143	299	101	302	32	207	539%
New Brunswick	1,829	2,090	1,460	999	1,324	862	545	200	241	1,015	322%
Quebec	15,385	12,610	9,117	13,346	14,320	22,113	27,311	25,116	24,660	28,962	17%
Ontario	59,848	62,343	52,916	60,960	63,277	76,520	75,805	73,080	69,798	86,724	24%
British Columbia	43,599	42,308	41,806	42,458	57,489	71,120	60,056	62,160	54,645	58,837	8%
Other Provinces	3,079	2,065	1,982	2,006	2,183	1,816	1,954	1,663	1,331	2,104	58%
Canada	123,740	121,590	107,453	119,878	138,735	172,730	165,772	162,521	150,706	177,849	18%

* % Change from 2005-2006 to 2006-2007

Statistics Canada

Table 5-8 - Imports of Fresh Apples by Major Countries (August to July)

Countries	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	% Change *
Value (\$ '000)											
United States	99,179	88,165	84,020	93,927	110,511	130,155	113,881	104,067	108,098	140,075	30%
Chile	9,235	10,008	9,537	14,219	15,436	19,811	24,303	17,099	21,676	25,824	19%
New Zealand	12,458	13,999	15,549	10,116	12,705	13,408	15,075	11,906	10,940	10,337	-6%
South Africa	12,267	10,221	7,357	6,276	7,949	6,716	7,730	4,330	4,458	3,942	-12%
China	24	0	3	2	5	887	4,764	4,206	4,247	6,697	58%
Argentina	166	1,588	649	553	503	820	207	173	217	1,269	485%
France	34	8	2	1,520	535	1,042	1,186	202	155	62	-60%
Other Countries	389	381	572	572	218	143	392	244	6	273	4231%
Total	133,752	124,368	117,689	127,186	147,863	172,982	167,538	142,227	149,797	188,479	26%
Volume (t)											
United States	97,540	93,416	81,676	93,325	108,424	138,738	125,758	132,915	118,829	138,626	17%
Chile	7,432	8,288	7,924	12,064	12,349	15,566	18,834	14,670	17,118	21,786	27%
New Zealand	9,024	10,345	10,574	6,633	9,543	9,689	9,487	7,238	7,456	7,514	1%
South Africa	9,216	8,041	6,298	5,461	7,356	6,417	6,838	3,564	3,395	2,827	-17%
China	22	0	2	2	4	613	3,410	3,602	3,619	5,874	62%
Argentina	146	1,168	521	486	404	695	184	163	159	945	494%
France	29	7	1	1,299	462	894	891	163	127	43	-66%
Other Countries	330	325	430	606	193	117	319	206	3	204	6700%
Total	123,739	121,590	107,426	119,875	138,734	172,729	165,721	162,521	150,706	177,819	18%

* % Change from 2005-2006 to 2006-2007

Statistics Canada

Canadian imports of fresh apples reached 177,819 t for the 2006-2007 marketing year which is the highest volume of apple imports in the last 10 years. This volume is 18% higher than the previous year and 7% above the 5-year average of 165,899 MT.

Canada is a net importer of apples with most of its fresh apple imports coming in from the U.S. and secondly from Chile. The U.S., which produces around 7% of the world's total apple production, exerts a great influence on the Canadian apple market as Canada has become the second top destination for U.S. fresh apple exports. With the emergence of China as a major exporter of fresh apples, particularly to other Asian countries, both the U.S. and Canada have seen a decline in their share of the Asian market. Furthermore, the antidumping duties imposed by Mexico in August 2002 on imports of U.S. Red and Golden Delicious apples have diverted a significant portion of the U.S. exports to Canada, contributing to a wider Canadian apple trade deficit (imports exceeding exports by almost 142,000 t in 2006-2007) and creating downward pressures on prices in Canada. These downward pressures on prices are further exacerbated when the U.S. experiences a bumper apple crop, as during the 2004-2005 marketing season, when following the 2004 bumper apple crop in Washington, massive amounts of low-priced apples from Washington flooded the Canadian marketplace.

Total fresh apple imports from the US reached 138,626 t in 2006-2007, almost equal to the record level reached in 2002-2003, while imports from Chile, the second top source of apple imports, reached a record level at 21,786 MT. The estimated value of Canadian apple imports was \$188.5 million in 2006-2007, representing an all-time high and a 26% increase compared to the previous year.

Table 5-9 - Top 25 World Apple Producers

Country	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Volume ('000 t)											
1 China	17,229.7	19,492.5	20,811.8	20,439.1	20,024.7	19,252.6	21,107.6	23,684.5	24,019.5	26,065.5	9%
2 United States	4,682.0	5,282.5	4,822.1	4,682.0	4,276.8	3,866.4	3,947.6	4,699.9	4,408.9	4,568.6	4%
3 Turkey	2,550.0	2,450.0	2,500.0	2,400.0	2,450.0	2,200.0	2,600.0	2,100.0	2,570.0	2,002.0	-22%
4 France	2,473.0	2,209.9	2,165.8	2,156.9	2,397.0	2,432.2	2,136.9	2,203.7	1,856.7	1,705.5	-8%
5 Iran, Islamic R	1,998.1	1,943.6	2,137.0	2,141.7	2,353.4	2,334.0	2,400.0	2,178.6	2,661.9	2,661.9	0%
6 Italy	1,966.5	2,143.3	2,343.8	2,232.1	2,299.1	2,199.2	1,953.8	2,136.2	2,192.0	2,112.7	-4%
7 Poland	2,098.3	1,687.2	1,604.2	1,450.4	2,433.9	2,167.5	2,427.8	2,521.5	2,075.0	2,304.9	11%
8 Germany	1,602.1	2,296.2	2,268.4	3,136.8	1,779.0	1,471.1	818.0	979.7	891.4	947.6	6%
9 Russian Feder	1,500.0	1,330.0	1,060.0	1,832.0	1,640.0	1,950.0	1,690.0	2,030.0	1,773.0	1,617.0	-9%
10 India	1,308.4	1,320.6	1,380.0	1,050.0	1,230.0	1,160.0	1,470.0	1,521.6	1,739.0	1,739.0	0%
11 Argentina	1,117.7	1,033.5	1,116.0	833.3	1,428.8	1,156.8	1,307.5	1,262.4	1,271.5	1,271.5	0%
12 Chile	845.0	975.0	1,175.0	805.0	1,135.0	1,150.0	1,250.0	1,300.0	1,350.0	1,350.0	0%
13 Japan	993.3	879.1	927.7	799.6	930.7	925.8	842.1	754.6	818.9	831.8	2%
14 Brazil	793.6	791.4	937.7	1,153.3	716.0	857.4	841.8	980.2	850.5	861.4	1%
15 Spain	983.7	736.0	988.4	813.8	917.4	694.8	881.1	690.9	774.2	660.7	-15%
16 Ukraine	1,897.8	568.2	296.8	648.2	474.7	522.3	871.3	716.9	719.8	475.0	-34%
17 Korea, Dem P	630.0	640.0	650.0	650.0	660.0	660.0	660.0	665.0	668.0	668.0	0%
18 South Africa	535.1	586.3	565.7	574.0	562.5	591.4	701.7	765.4	680.4	639.8	-6%
19 Romania	664.0	364.6	315.0	490.3	507.4	491.5	811.1	1,097.8	638.0	590.4	-7%
20 Hungary	499.9	482.0	444.5	694.6	605.4	526.9	507.5	700.4	510.4	505.5	-1%
21 New Zealand	567.0	523.0	545.0	620.0	473.7	530.6	501.2	546.0	524.0	524.0	0%
22 Mexico	629.3	370.2	449.9	338.0	442.7	480.0	495.0	573.0	584.0	601.5	3%
23 Egypt	403.3	388.5	415.6	468.3	473.6	524.9	533.3	546.2	550.0	550.0	0%
24 Korea, Republ	651.8	459.0	490.5	489.0	403.6	433.2	365.4	357.2	367.5	407.6	11%
25 Canada	503.6	489.0	632.4	542.6	465.4	381.9	379.2	370.3	408.6	340.2	-17%
Others	8,368.4	7,226.6	6,868.7	7,609.0	6,474.5	6,931.6	6,896.3	7,230.4	7,123.7	7,802.4	10%
World	57,491.6	56,668.2	57,912.0	59,050.0	57,555.3	55,892.1	58,396.2	62,612.4	62,026.9	63,804.5	3%

2007 data not available, ranking based on total of last 10 years

FAO

Despite a global downward trend in the world's apple bearing area since it peaked in the mid-1990s, it appears that world apple production has been able to set records first in 2004 when it reached 62.6 million t and then again in 2006 when it peaked at 63.8 million t. World apple production in 2006 was 3% higher than in 2005 and 5% above the 5-year average.

China is still by far the number one producer of apples in the world, with an estimated production of over 26 million tons in 2006, which represents almost 41% of total apple production in the world. China has not only the world's largest apple production, but has also the most rapidly increasing apple production (5 fold increase between 1990 and 2005) and exports, with a more than four fold increase in fresh apple exports over the last ten years. The most recent trade data from the Global Trade Atlas confirms that China, with fresh apple exports of about 804 million kg in calendar year 2006, is now the largest exporter of apples in the world. In contrast, Canada's apple production, estimated for 2006 at 0.34 million metric tons, represents less than 0.54% of total world production. Canadian 2006 apple exports (mostly to the U.S.) reached 49 million kg representing less than 0.8% of global exports of fresh apples.

Table 5-10 - Canadian Tender Fruit Value and Volume of Production

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Apricots	975	1,675	1,130	1,465	1,415	1,490	1,460	1,900	920	1,035	13%
Cherries (sweet / sour)	12,092	18,499	19,350	23,126	22,180	29,000	27,275	28,570	27,400	31,670	16%
Peaches & Nectarines	34,030	X	33,125	37,610	38,095	40,770	37,890	31,215	41,195	42,855	4%
Pears	12,049	13,031	10,171	9,261	10,571	9,780	10,365	7,845	10,320	10,240	-1%
Plums & Prunes	4,478	4,167	3,447	4,143	2,915	4,365	4,030	4,175	5,253	4,600	-12%
Total	63,624	X	67,223	75,605	75,176	85,405	81,020	73,705	85,088	90,400	6%
Marketed Volume (t)											
Apricots	875	776	1,036	1,365	982	1,221	1,250	1,617	826	889	8%
Cherries (sweet/sour)	11,019	13,089	11,290	12,089	9,789	13,508	12,750	14,966	12,748	11,998	-6%
Peaches & Nectarines	33,528	X	32,328	34,062	33,126	34,370	33,768	25,478	35,637	36,732	3%
Pears	18,372	20,188	20,609	17,457	14,917	15,232	13,674	10,714	13,542	13,381	-1%
Plums & Prunes	3,873	3,920	3,146	3,634	2,876	3,469	3,189	2,815	3,673	3,055	-17%
Total	67,667	X	68,409	68,607	61,690	67,800	64,631	55,590	66,426	66,055	-1%
Total Volume (t)											
Apricots	875	883	1,036	1,365	1,286	1,221	1,266	1,622	866	889	3%
Cherries (sweet/sour)	11,666	13,193	11,485	12,227	10,543	13,689	13,113	15,048	12,866	12,569	-2%
Peaches & Nectarines	33,528	X	32,389	34,297	33,167	34,370	34,158	25,705	37,505	36,732	-2%
Pears	18,372	20,188	20,677	17,457	14,937	15,256	13,712	10,727	15,130	13,626	-10%
Plums & Prunes	4,143	3,924	3,146	3,641	2,931	3,492	3,191	2,828	3,673	3,057	-17%
Total	68,584	X	68,733	68,987	62,864	68,028	65,440	55,930	70,040	66,873	-5%
Bearing Area (ha)											
Apricots	225	200	203	209	201	211	200	164	127	115	-9%
Cherries (sweet/sour)	1,853	1,901	1,938	2,119	1,909	1,967	2,045	1,947	2,288	2,046	-11%
Peaches & Nectarines	3,218	X	3,071	3,160	3,088	3,276	3,197	2,831	3,280	3,257	-1%
Pears	1,637	1,430	1,404	1,390	1,344	1,261	1,137	1,068	1,174	1,147	-2%
Plums & Prunes	735	684	678	676	627	647	599	556	540	488	-10%
Total	7,668	X	7,294	7,554	7,169	7,362	7,178	6,566	7,409	7,053	-5%
Bearing and Non-Bearing Area (ha)											
Apricots	249	233	233	236	235	235	239	176	168	158	-6%
Cherries (sweet/sour)	2,157	2,162	2,415	2,453	2,376	2,382	2,390	2,339	2,756	2,677	-3%
Peaches & Nectarines	3,841	X	3,734	3,728	3,689	3,788	3,774	3,389	3,966	3,962	0%
Pears	1,772	1,578	1,564	1,574	1,524	1,526	1,402	1,356	1,394	1,313	-6%
Plums & Prunes	826	820	812	804	782	792	641	619	603	538	-11%
Total	8,845	X	8,758	8,795	8,606	8,723	8,446	7,879	8,887	8,648	-3%

Statistics Canada (22-003-X1B)

Tender fruit production is mostly concentrated in Ontario and BC. Total production for 2007 is estimated at 66,873 t, 5% lower than in 2006 while 2% above the 5-year average. In Ontario, all tender fruit crops with the exception of cherries were down from last year mainly due to drought conditions, while BC's crop was overall slightly higher than last year. The area of production for most tender fruits has been decreasing over the last five to ten years, except for peaches/nectarines (up 4.6 % since 2003) and cherries (up 12% since 2003 and 24% since 1998), particularly sweet cherries which have benefited from the introduction of new cherry varieties developed in Canada that mature later, produce larger fruit and command higher prices in the market.

Table 5-11 – Canadian Wine Grape (Vinifera) Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Ontario	X	X	37,655	43,715	41,500	24,230	45,810	19,730	64,850	55,045	-15%
British Columbia	15,600	15,490	16,315	22,235	23,200	23,400	27,850	25,400	29,560	25,760	-13%
Other Provinces	X	X	X	X	810	790	820	1,145	1,565	2,060	32%
Canada	53,105	X	X	X	65,510	48,420	74,480	46,275	95,975	82,865	-14%
Marketed Volume (t)											
Ontario	X	X	39,440	42,329	40,370	26,839	46,471	18,597	53,147	45,423	-15%
British Columbia	11,793	7,026	9,675	10,773	14,737	14,186	17,282	14,293	16,171	14,386	-11%
Other Provinces	X	X	X	X	1,061	873	1,027	1,111	1,615	1,301	-19%
Canada	47,049	X	X	X	56,168	41,898	64,780	34,001	70,933	61,110	-14%
Total Volume (t)											
Ontario	X	X	43,277	42,329	40,370	26,839	46,471	18,597	53,147	45,423	-15%
British Columbia	11,793	10,451	9,675	11,771	17,463	14,515	17,690	14,928	16,624	16,200	-3%
Other Provinces	X	X	X	X	1,456	1,200	1,106	1,202	1,842	1,869	1%
Canada	48,419	X	X	X	59,289	42,554	65,267	34,727	71,613	63,492	-11%
Bearing Area (ha)											
Ontario	X	X	4,452	4,694	4,613	4,532	4,937	4,116	5,245	5,220	0%
British Columbia	1,315	1,781	2,157	2,361	2,363	2,347	2,630	2,671	2,509	2,519	0%
Other Provinces	X	X	X	X	274	284	274	275	326	363	11%
Canada	5,635	X	X	X	7,250	7,163	7,841	7,062	8,080	8,102	0%
Bearing and Non-Bearing Area (ha)											
Ontario	X	X	5,301	5,587	5,605	5,625	5,666	5,666	6,273	6,273	0%
British Columbia	1,740	2,274	2,679	2,788	2,792	2,833	2,833	2,833	2,914	2,954	1%
Other Provinces	X	X	X	X	332	334	333	333	588	589	0%
Canada	6,746	X	X	X	8,729	8,792	8,832	8,832	9,775	9,816	0%

Statistics Canada (22-003-X1B)

Vinifera grape production for 2007 is estimated at 63,492 t, which is 11% lower than in 2006 but 14% above the 5-year average. Grape area continues to expand, not only in BC and Ontario which are the major wine producing areas, but also in Quebec and the Maritimes, driven by the strong demand for high quality Canadian wines sold under the VQA (Vintners' Quality Assurance) banner which has led to increased plantings of vinifera grapes. Total planted area for 2007 is estimated at 9,816 hectares (24,255 acres), 6.6% above the 5-year average and up by 46% from ten years ago.

Table 5-12 – Canadian Low-Bush Blueberry Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Nova Scotia	15,600	X	X	X	15,075	29,000	21,200	24,140	X	27,700	na
New Brunswick	7,950	X	X	X	5,550	11,000	10,800	14,600	6,500	X	na
Quebec	2,735	36,560	19,890	25,300	20,600	16,510	25,200	17,930	73,275	32,000	-56%
Other Provinces	2,605	X	X	X	2,250	3,570	4,950	5,345	X	X	na
Canada	28,890	81,565	58,895	45,975	43,475	60,080	62,150	62,015	129,105	89,305	-31%
Marketed Volume (t)											
Nova Scotia	10,083	X	X	X	17,735	26,195	17,305	15,547	13,880	11,975	-14%
New Brunswick	5,080	X	X	X	6,940	10,977	8,664	9,117	3,810	X	na
Quebec	1,077	21,217	11,181	24,902	18,597	13,367	19,958	14,470	29,937	14,470	-52%
Other Provinces	1,926	X	X	X	2,461	3,570	3,966	4,046	9,294	X	na
Canada	18,166	49,836	39,755	44,933	45,733	54,109	49,893	43,180	56,921	42,293	-26%
Total Volume (t)											
Nova Scotia	10,083	X	X	X	17,735	26,195	18,597	16,000	13,880	11,975	-14%
New Brunswick	5,080	X	X	X	6,940	10,977	8,664	9,117	3,810	X	na
Quebec	1,077	21,217	11,181	24,902	18,597	13,367	20,865	14,470	29,937	14,470	-52%
Other Provinces	1,926	X	X	X	2,461	3,570	3,967	4,046	9,297	X	na
Canada	18,166	49,884	39,755	46,366	45,733	54,109	52,093	43,633	56,924	42,293	-26%
Bearing Area (ha)											
Nova Scotia	6,677	6,880	7,082	5,908	6,232	7,932	7,689	7,487	6,961	7,284	5%
New Brunswick	3,723	3,822	3,867	4,144	4,047	4,452	4,694	5,261	4,836	X	na
Quebec	5,585	7,487	8,498	7,487	9,105	6,042	8,094	7,972	9,348	7,972	-15%
Other Provinces	1,194	1,353	1,524	1,679	1,656	1,719	2,068	1,959	1,865	X	na
Canada	17,179	19,542	20,971	19,218	21,040	20,145	22,545	22,679	23,010	21,608	-6%
Bearing and Non-Bearing Area (ha)											
Nova Scotia	13,342	13,927	14,514	15,099	15,378	15,985	14,973	14,973	15,378	14,973	-3%
New Brunswick	7,284	7,543	8,094	8,378	8,701	8,903	8,903	9,510	8,903	X	na
Quebec	12,343	12,748	13,152	13,373	12,909	11,999	11,938	11,736	16,187	15,378	-5%
Other Provinces	3,101	3,256	3,440	3,653	3,642	4,027	3,922	3,760	4,448	X	na
Canada	36,070	37,474	39,200	40,503	40,630	40,914	39,736	39,979	44,916	43,710	-3%

na data not available

Statistics Canada (22-003-X1B)

Canada continues to lead as the world's largest producer of low-bush blueberries, with a production estimated at 42,293 t in 2007, 26% lower than the record 2006 crop of 56,924 t and 15% below the 5-year average of 49,810 t. The 2007 low-bush blueberry crop was the smallest crop in the last 5 years mainly due to lower yields in Quebec and Nova Scotia, where production declines year over year were 52% and 14% respectively. The drop in production was due primarily to severe winter kill and a major spring frost in Quebec and to poor pollination, winter kill, weed pressure and foliar diseases in Nova Scotia.

Despite lower yields, the relatively high prices producers obtained for their 2007 crop thanks to continuing strong market demand for blueberries, made low-bush blueberries the second leading fruit crop (after high-bush blueberries) in terms of marketed value with an estimated farm gate value of over \$89 million.

The Canadian industry has been delivering an ever-increasing share of the annual North American production of low-bush blueberries over the last few years. With the continued introduction of new land into production, (particularly in Quebec where total bearing and non-bearing area has increased by 28% in the last 5 years to reach 15,378 ha in 2007), improvements in crop yields, and more widespread adoption of mechanical harvesting methods, the supply of Canadian low-bush blueberries is expected to continue to increase in the near future.

Table 5-13 – Canadian High-Bush Blueberry Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
British Columbia	23,055	32,930	43,350	33,890	43,500	57,900	72,700	68,115	68,000	92,450	36%
Other Provinces	3,217	3,380	3,840	3,460	3,790	2,760	4,545	4,830	8,655	7,375	-15%
Canada	26,272	36,310	47,190	37,350	47,290	60,660	77,245	72,945	76,655	99,825	30%
Marketed Volume (t)											
British Columbia	15,497	15,415	19,777	21,682	18,098	23,795	31,230	25,016	23,587	33,466	42%
Other Provinces	956	1,248	1,084	1,052	1,030	704	1,191	1,218	2,018	1,642	-19%
Canada	16,453	16,663	20,861	22,734	19,128	24,499	32,421	26,234	25,605	35,108	37%
Total Volume (t)											
British Columbia	15,497	15,418	19,777	21,999	19,051	23,795	31,230	25,016	25,628	33,466	31%
Other Provinces	1,053	1,279	1,084	1,053	1,032	713	1,191	1,218	2,062	1,644	-20%
Canada	16,550	16,697	20,861	23,052	20,083	24,508	32,421	26,234	27,690	35,110	27%
Bearing Area (ha)											
British Columbia	2,060	2,307	2,434	2,550	2,580	2,711	3,286	3,318	3,298	3,885	18%
Other Provinces	386	400	403	396	376	413	429	429	563	512	-9%
Canada	2,446	2,707	2,837	2,946	2,956	3,124	3,715	3,747	3,861	4,397	14%
Bearing and Non-Bearing Area (ha)											
British Columbia	2,329	2,448	2,711	2,957	2,954	2,995	3,440	3,480	4,452	6,475	45%
Other Provinces	516	516	502	510	464	530	532	518	645	660	2%
Canada	2,845	2,964	3,213	3,467	3,418	3,525	3,972	3,998	5,097	7,135	40%

Statistics Canada (22-003-X1B)

The 2007 Canadian high-bush blueberry crop is estimated at a record 35,110 t, 27% higher than in 2006 and 20% above the 5-year average of 29,193 t. Although this is the largest crop on record, the BC crop, which accounts for more than 95% of the total production, was well below initial expectations due to significant winter damage and adverse weather conditions during the harvest.

With demand for blueberries still extremely strong, the 2007 farm gate value for the Canadian high-bush blueberry crop reached an all-time high of almost \$100 million, thus making the high-bush blueberry the most valuable fruit crop in terms of marketed value.

In 2007, total area devoted to high-bush blueberry production which reached 7,135 hectares (17,630 acres), was up by 40% compared to 2006 and 50% above the 5-year average of 4,745 hectares. While the production area devoted to low-bush blueberries has increased moderately in the last 5 years, the bearing and non-bearing area for high-bush blueberries has more than doubled in the same time period (from 2003 to 2007). As a result of this dramatic increase in total area and the resulting increase in production, high-bush blueberries accounted for 37.7% of total fruit sales in BC in 2007.

One of the major challenges lying ahead for both the Canadian high-bush and low-bush blueberry industries is finding new markets in order to sustain the high prices growers have enjoyed in the last few years as both industries will be facing strong competition due to significant increases in high-bush blueberry acreage not only in North America, but also in countries such as Argentina, Chile and China.

Table 5-14 - Canadian Raspberry Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Quebec	4,415	5,835	5,745	5,930	6,325	4,365	5,585	4,225	4,180	4,345	4%
Ontario	3,505	3,645	3,475	3,470	3,850	2,700	3,200	2,450	3,230	3,290	2%
British Columbia	12,330	26,295	12,760	16,965	18,400	18,700	21,575	18,115	14,230	12,800	-10%
Other Provinces	1,118	1,165	1,229	1,075	1,355	1,185	1,420	1,560	1,720	1,370	-20%
Canada	21,368	36,940	23,209	27,440	29,930	26,950	31,780	26,350	23,360	21,805	-7%
Marketed Volume (t)											
Quebec	1,315	1,764	1,551	1,486	1,576	1,036	1,347	1,034	1,021	1,066	4%
Ontario	873	855	771	696	728	526	635	510	599	506	-16%
British Columbia	12,939	14,413	14,889	12,143	12,247	12,406	11,072	10,981	10,501	9,684	-8%
Other Provinces	343	316	313	258	329	268	286	316	321	261	-19%
Canada	15,470	17,348	17,524	14,583	14,880	14,236	13,340	12,841	12,442	11,517	-7%
Total Volume (t)											
Quebec	1,315	1,764	1,551	1,486	1,588	1,073	1,347	1,034	1,034	1,066	3%
Ontario	973	907	794	696	728	526	635	510	599	506	-16%
British Columbia	12,939	14,413	14,889	13,517	13,472	12,701	12,020	11,340	10,501	9,684	-8%
Other Provinces	370	348	326	261	337	267	286	316	322	261	-19%
Canada	15,597	17,432	17,560	15,960	16,125	14,567	14,288	13,200	12,456	11,517	-8%
Bearing Area (ha)											
Quebec	700	647	647	647	647	668	647	465	465	465	0%
Ontario	449	445	445	445	445	445	384	324	312	297	-5%
British Columbia	2,084	2,064	2,056	2,064	2,023	1,983	1,922	1,922	1,813	1,752	-3%
Other Provinces	255	249	253	251	248	249	227	227	239	197	-18%
Canada	3,488	3,405	3,401	3,407	3,363	3,345	3,173	2,938	2,829	2,711	-4%
Bearing and Non-Bearing Area (ha)											
Quebec	769	728	728	740	728	728	728	607	769	728	-5%
Ontario	567	546	526	526	506	526	445	384	376	324	-14%
British Columbia	2,266	2,226	2,226	2,226	2,226	2,226	2,185	1,983	1,813	1,781	-2%
Other Provinces	321	324	332	343	332	340	310	302	336	303	-10%
Canada	3,923	3,824	3,812	3,835	3,792	3,820	3,668	3,276	3,294	3,136	-5%

Statistics Canada (22-003-X1B)

Although raspberries can be grown in most Canadian provinces, BC accounts for almost the entire annual Canadian production of raspberries (84% in 2007). Total production for 2007 is estimated at 11,517 t, 8% lower than in 2006 and 13% below the 5-year average. This drop in production was mainly due to a smaller crop in BC, which at 9,684 t was the smallest crop in ten years, while all other provinces except Quebec also recorded lower production levels.

Total area devoted to raspberry production has been steadily declining over the last ten years. In 2007, total bearing and non-bearing area stood at 3,136 hectares (7,750 acres), 5% lower than in 2006 and 9% below the 5-year average of 3,439 hectares. The farm gate value for the 2007 crop is estimated at \$21.8 million, which is 7% lower than in 2006 and 16% below the 5-year average. This would make the 2007 crop the Canadian raspberry crop with the lowest market value since 1999.

Grower prices have dropped considerably in the last few years due to an increasingly competitive market environment and the continuing weakness of the US dollar against the Canadian dollar and virtually all other major currencies. Approximately 90% of the raspberries grown in BC are processed and consumed as jam, juice, yogurt flavoring, whole frozen berries, and about 10% are eaten fresh. Growers in BC compete on a world market with major producers including Washington State, Serbia and Chile.

Table 5-15 - Canadian Strawberry Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Quebec	15,050	15,950	15,350	16,890	14,850	17,770	22,190	24,910	28,215	25,200	-11%
Ontario	18,070	19,800	19,565	19,930	18,975	17,925	16,025	15,620	22,100	20,450	-7%
Other Provinces	19,895	18,195	18,635	19,070	18,571	17,780	18,675	18,160	15,220	14,935	-2%
Canada	53,015	53,945	53,550	55,890	52,396	53,475	56,890	58,690	65,535	60,585	-8%
Marketed Volume (t)											
Quebec	9,798	9,571	8,986	9,457	9,024	9,877	9,798	10,147	12,088	11,907	-1%
Ontario	9,153	10,229	8,208	8,484	7,938	7,394	6,622	6,078	7,484	7,121	-5%
Other Provinces	8,720	8,407	8,631	8,258	8,106	7,250	7,074	6,074	5,410	4,874	-10%
Canada	27,671	28,207	25,825	26,199	25,068	24,521	23,494	22,299	24,982	23,902	-4%
Total Volume (t)											
Quebec	9,888	10,315	9,040	10,893	9,024	9,877	9,798	10,147	12,088	11,907	-1%
Ontario	9,623	11,417	8,208	8,484	8,029	7,394	6,622	6,078	7,484	7,121	-5%
Other Provinces	8,918	8,470	8,677	8,258	8,659	7,250	7,609	6,232	5,534	4,874	-12%
Canada	28,429	30,202	25,925	27,635	25,712	24,521	24,029	22,457	25,106	23,902	-5%
Bearing Area (ha)											
Quebec	1,760	1,457	1,412	1,538	1,447	1,562	1,560	1,558	1,558	1,558	0%
Ontario	1,659	1,659	1,659	1,659	1,659	1,457	1,255	1,194	1,453	1,406	-3%
Other Provinces	1,678	1,623	1,593	1,619	1,578	1,459	1,343	1,271	1,088	931	-14%
Canada	5,097	4,739	4,664	4,816	4,684	4,478	4,158	4,023	4,099	3,895	-5%
Bearing and Non-Bearing Area (ha)											
Quebec	2,145	2,064	1,983	1,918	1,902	1,942	1,862	1,862	1,942	1,862	-4%
Ontario	2,104	2,064	2,064	2,024	1,902	1,781	1,619	1,497	1,700	1,700	0%
Other Provinces	2,200	2,159	2,151	2,062	1,989	1,870	1,673	1,584	1,475	1,371	-7%
Canada	6,449	6,287	6,198	6,004	5,793	5,593	5,154	4,943	5,117	4,933	-4%

Statistics Canada (22-003-X1B)

The 2007 strawberry crop is estimated at 23,902 t, 5% lower than in 2006 and almost at the same level than the 5-year average of 24,003 t. The value of the crop is estimated at almost \$61 million, which is 8% lower than the record level of \$65.5 million reached in 2006, but 3% higher than the 5-year average of \$59 million. Production in Quebec, which produces nearly 50% of the Canadian strawberry crop, was almost unchanged from the previous year at 11,907 t, but 11% above the province's 5-year average of 10,763 t.

Table 5-16 - Canadian Cranberry Value and Volume of Production

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Marketed Value (\$ '000)											
Quebec	X	X	X	X	13,400	22,800	22,300	22,810	X	X	na
British Columbia	28,395	16,200	7,599	11,815	23,500	21,300	33,930	30,000	32,300	30,520	-6%
Other Provinces	X	X	X	X	3,345	4,690	3,370	3,395	X	X	na
Canada	52,345	31,759	24,944	30,915	40,245	48,790	59,600	56,205	80,170	69,270	-14%
Marketed Volume (t)											
Quebec	X	X	X	X	14,005	19,550	24,494	26,680	X	X	na
British Columbia	22,906	25,242	21,183	19,495	35,335	30,119	38,964	37,694	35,925	34,405	-4%
Other Provinces	X	X	X	X	2,222	2,982	3,331	3,497	X	X	na
Canada	36,219	40,157	37,269	36,648	51,562	52,651	66,789	67,871	77,086	66,363	-14%
Total Volume (t)											
Quebec	X	X	X	X	14,005	19,550	24,494	30,014	X	X	na
British Columbia	22,906	25,242	21,183	22,836	35,335	32,568	38,964	37,694	35,925	34,405	-4%
Other Provinces	X	X	X	X	2,222	2,982	3,331	3,497	X	X	na
Canada	36,219	40,157	37,272	39,989	51,562	55,100	66,789	71,205	79,819	67,361	-16%
Bearing Area (ha)											
Quebec	X	X	X	X	931	1,117	1,072	1,299	X	X	na
British Columbia	1,295	1,295	1,376	1,457	1,457	1,497	1,562	1,562	1,554	1,435	-8%
Other Provinces	X	X	X	X	159	215	233	255	X	0	na
Canada	2,179	2,208	2,331	2,523	2,547	2,829	2,867	3,116	3,310	3,282	-1%
Bearing and Non-Bearing Area (ha)											
Quebec	X	X	X	X	1,052	1,295	1,335	1,550	X	X	na
British Columbia	1,416	1,457	1,518	1,640	1,619	1,619	1,659	1,659	1,700	1,659	-2%
Other Provinces	X	X	X	X	263	283	284	281	X	0	na
Canada	2,477	2,608	2,770	3,007	2,934	3,197	3,278	3,490	3,796	3,842	1%

na data not available

Statistics Canada (22-003-X1B)

The Canadian cranberry industry continues to enjoy a strong market. Although the 2007 crop is estimated at 67,361 t, 16% lower than the record crop of 2006 and slightly below the 5-year average, the estimated market value of the crop is \$69.2 million, making the 2007 crop the second highest valued cranberry crop after the 2006 crop.

The area under cultivation reached 3,842 hectares in 2007, up 1% from 2006 and 9% above the 5-year average. In the last ten years, total bearing and non-bearing area has increased by 55% due to strong prices which in the early 90s encouraged expansion and extensive development of many new farms, particularly in eastern Canada where availability of reasonably-priced agricultural land is not as much an issue as in BC. In 1998, BC accounted for 57% of Canada's total cranberry area. However, as a result of steady growth in Québec and the Maritimes, BC represented only 43% of Canada's total cranberry area in 2007.

Table 5-17 - Value and Volume of Canadian Exports and Imports of Fresh Berries

Commodity	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07 / 06
Value (\$ '000)											
Blueberries											
Total Exports	20,433	32,054	38,962	46,645	51,083	53,289	58,089	56,650	67,584	57,283	-15%
Total Imports	6,430	15,619	26,810	27,647	27,711	36,840	39,079	51,218	70,450	82,056	16%
Balance of Trade	14,003	16,434	12,152	18,998	23,372	16,449	19,010	5,432	-2,866	-24,773	764%
Raspberries											
Total Exports	4,951	10,599	5,153	7,883	4,879	5,679	8,083	7,697	3,059	4,442	45%
Total Imports*	8,729	12,927	11,030	13,838	20,089	24,982	36,797	50,478	73,536	104,017	41%
Balance of Trade	-3,778	-2,329	-5,877	-5,955	-15,209	-19,303	-28,714	-42,781	-70,477	-99,575	41%
Strawberries											
Total Exports	224	556	1,031	728	924	692	785	675	621	851	37%
Total Imports	81,587	103,893	115,224	121,932	152,086	172,789	184,389	202,210	225,259	234,831	4%
Balance of Trade	-81,363	-103,337	-114,193	-121,203	-151,162	-172,097	-183,604	-201,535	-224,638	-233,980	4%
Cranberries											
Total Exports**	59,502	29,490	26,217	27,723	30,462	35,940	52,397	47,306	48,116	44,309	-8%
Total Imports	13,448	6,602	5,518	7,925	10,551	5,263	4,534	4,289	4,140	5,605	35%
Balance of Trade	46,055	22,889	20,700	19,797	19,911	30,677	47,864	43,017	43,976	38,704	-12%
Volume (t)											
Blueberries											
Total Exports	7,457	12,842	13,729	18,393	15,691	18,143	19,776	15,173	15,915	12,770	-20%
Total Imports	2,156	9,580	18,600	17,615	15,255	20,109	16,221	21,373	22,954	24,557	7%
Balance of Trade	5,300	3,262	-4,871	778	436	-1,966	3,556	-6,200	-7,039	-11,787	67%
Raspberries											
Total Exports	2,976	3,930	3,501	4,065	2,132	2,692	2,893	3,097	1,641	2,319	41%
Total Imports*	2,875	4,547	3,570	4,673	6,626	7,989	7,674	8,603	11,599	18,055	56%
Balance of Trade	101	-617	-69	-607	-4,494	-5,298	-4,781	-5,506	-9,958	-15,736	58%
Strawberries											
Total Exports	70	170	479	273	401	258	214	167	140	185	32%
Total Imports	37,480	45,668	50,131	45,514	56,479	59,393	64,356	74,834	84,731	87,312	3%
Balance of Trade	-37,410	-45,498	-49,653	-45,241	-56,078	-59,135	-64,141	-74,667	-84,591	-87,127	3%
Cranberries											
Total Exports**	26,274	29,026	26,819	26,888	40,324	43,762	44,958	40,828	47,185	45,316	-4%
Total Imports	5,632	2,464	2,337	3,409	3,806	2,048	2,654	2,304	2,514	3,353	33%
Balance of Trade	20,643	26,561	24,481	23,480	36,518	41,713	42,304	38,524	44,671	41,963	-6%

*: Imports may include small quantities of loganberries, blackberries and mulberries

** : Exports may include small quantities of bilberries and other berries of the Vaccinium species.

Source: Statistics Canada

Table 5-18 - Value and Volume of Canadian Exports and Imports of Frozen Berries*

Commodity	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07 / 06
Value (\$ '000)											
Blueberries											
Total Exports	81,428	104,137	120,239	116,936	107,134	133,680	164,507	202,507	253,969	266,377	5%
Total Imports	15,170	8,478	16,937	7,576	13,894	12,365	10,123	11,996	12,407	14,413	16%
Balance of Trade	66,258	95,658	103,302	109,360	93,239	121,314	154,384	190,511	241,562	251,964	4%
Raspberries											
Total Exports**	10,599	9,379	9,558	8,827	12,298	12,640	8,963	10,907	8,662	7,815	-10%
Total Imports	3,925	9,953	6,438	8,336	7,698	11,216	15,763	16,306	15,759	18,040	14%
Balance of Trade	6,674	-573	3,120	491	4,600	1,424	-6,800	-5,399	-7,097	-10,225	44%
Strawberries											
Total Exports	1,110	1,165	564	1,120	1,514	1,279	569	535	415	393	-5%
Total Imports	22,225	26,380	22,861	23,507	31,405	32,033	27,789	29,128	28,718	34,051	19%
Balance of Trade	-21,115	-25,215	-22,297	-22,388	-29,891	-30,754	-27,220	-28,594	-28,304	-33,658	19%
Cranberries											
Total Exports	na	na	na	na	na	na	na	na	na	na	na
Total Imports	1,312	1,370	1,496	5,397	1,070	3,745	1,866	2,750	4,190	3,705	-12%
Balance of Trade	na	na	na	na	na	na	na	na	na	na	na
Volume (t)											
Blueberries											
Total Exports	30,209	33,631	37,289	41,986	43,518	54,337	60,376	61,680	59,154	55,351	-6%
Total Imports	11,275	3,893	7,458	3,461	6,839	6,442	4,931	5,203	4,503	4,879	8%
Balance of Trade	18,934	29,738	29,831	38,525	36,679	47,895	55,445	56,477	54,651	50,472	-8%
Raspberries											
Total Exports**	6,867	4,232	4,976	4,882	5,837	6,166	3,536	4,689	4,771	4,356	-9%
Total Imports	1,572	4,278	2,596	3,810	3,303	5,149	6,891	7,412	7,300	8,901	22%
Balance of Trade	5,295	-46	2,380	1,072	2,534	1,017	-3,355	-2,723	-2,529	-4,545	80%
Strawberries											
Total Exports	457	451	235	447	693	745	315	340	211	185	-12%
Total Imports	13,881	16,269	14,433	14,870	18,481	20,703	17,051	18,948	18,693	19,500	4%
Balance of Trade	-13,423	-15,818	-14,198	-14,423	-17,788	-19,959	-16,736	-18,608	-18,482	-19,315	5%
Cranberries											
Total Exports	na	na	na	na	na	na	na	na	na	na	na
Total Imports	450	503	444	1,356	417	1,795	832	1,889	3,385	2,000	-41%
Balance of Trade	na	na	na	na	na	na	na	na	na	na	na

*: Volumes and values exclude frozen pulp where possible.

** : Exports may include small quantities of blackberries, mulberries, currants and gooseberries

na data not available

In any given year almost 95% of Canadian low-bush blueberry production is marketed as processed (frozen), while in contrast approximately 50% of the high-bush blueberry production is sold on the fresh market and the remainder marketed as frozen for use as ingredients by the food processing industry. Due to a worldwide increase in area planted for production of high-bush blueberry, the North American cultivated blueberry industry has become increasingly active in marketing frozen product in recent years. In 2007, Canadian exports of frozen blueberries reached 55,351 t (6% lower than in 2006), while exports of fresh blueberries reached 12,770 t (20% lower than in 2006). With imports of both fresh and frozen blueberries respectively 7% and 8% higher in 2007 compared to 2006, our overall surplus in blueberry trade in 2007 was 38,685 t, the lowest level in the last 5 years.

In 2007, Canadian exports of fresh cranberries were 45,316 t (4% lower than in 2006 but 2% above the 5-year average), while imports of fresh cranberries were 3,353 t, representing a 33% increase year over year. As a result, the overall surplus in fresh cranberry trade was 41,963 t, 6% lower than in 2006 but almost unchanged compared to the 5-year average of 41,835 t.

Table 5-19 - Consumption of Fruits in Canada

	1996	2001	2002	2003	2004	2005	2006
Consumption (kg per person)							
Fresh Fruits *							
Apples	7.74	7.39	6.82	6.90	6.50	7.21	6.82
Apricots	0.08	0.11	0.10	0.11	0.11	0.10	0.07
Avocados	0.18	0.20	0.24	0.25	0.30	0.28	0.34
Bananas	6.31	5.98	6.08	6.11	6.33	6.37	6.42
Berries other	0.06	0.15	0.23	0.22	0.20	0.18	0.22
Blueberries	0.16	0.26	0.25	0.35	0.38	0.53	0.50
Cherries	0.18	0.30	0.23	0.37	0.31	0.32	0.44
Other citrus	0.01	0.02	0.02	0.02	0.03	0.06	0.05
Coconut	0.20	0.23	0.24	0.25	0.23	0.25	0.25
Cranberries ¹	0.33	0.26	0.29	0.39	0.49	0.58	0.41
Dates	0.57	0.40	0.54	0.57	0.69	0.81	0.95
Figs	0.23	0.26	0.24	0.26	0.29	0.33	0.34
Grapefruits	0.83	0.59	0.62	0.55	0.54	0.48	0.50
Grapes	3.01		3.41	3.47	3.41	3.71	3.30
Guavas, mangoes	0.33	0.46	0.45	0.53	0.59	0.52	0.58
Kiwis	0.35	0.28	0.27	0.22	0.29	0.32	0.33
Lemons	0.35	0.43	0.45	0.46	0.44	0.45	0.46
Limes	0.13	0.21	0.21	0.22	0.24	0.25	0.27
Mandarins	1.28	1.27	1.40	1.38	1.39	1.57	1.62
Muskmelons, cantaloups	0.82	0.93	1.02	1.05	1.02	1.11	1.09
Other melons	0.12	0.10	0.13	0.09	0.12	0.15	0.19
Melons total	2.78	3.09	3.55	3.72	3.97	3.82	3.99
Nectarines	0.44	0.49	0.52	0.53	0.50	0.45	0.38
Oranges	4.75	4.47	4.75	4.99	4.80	5.09	4.89
Papayas	0.06	0.08	0.08	0.08	0.14	0.16	0.16
Peaches	0.67	0.59	0.61	0.62	0.59	0.54	0.53
Pears	1.40	1.59	1.61	1.64	1.45	1.44	1.54
Pineapples	0.21	0.55	0.62	0.68	0.77	0.90	1.11
Plums	0.64	0.64	0.65	0.63	0.55	0.60	0.53
Strawberries	1.34	1.33	1.47	1.55	1.62	1.80	1.91
Unspecified fresh fruits	0.28	0.36	0.36	0.33	0.34	0.27	0.29
Watermelons	1.39	1.31	1.77	2.03	2.25	1.93	2.07
Wintermelons	0.45	0.75	0.63	0.55	0.58	0.63	0.64
Total fresh fruits	33.49	33.60	34.75	35.88	35.92	37.63	37.58

* Experimental, use with caution. The data have been adjusted for retail, household, cooking and plate loss.

Statistics Canada (21-020-XIE,)

Total Canadian fresh fruit consumption is estimated at 37.58 kg per person for 2006 (latest year for which data is available), almost unchanged from the previous year, but 3.4% above the 5-year average of 36.35 kg per person. Even though consumption of apples decreased to 6.82 kg per person in 2006 (from 7.21 kg in 2005), apples remain the most consumed fruit, followed by bananas (6.42 kg) and oranges (4.89 kg). Fruits showing the highest consumption growth in the 5-year period from 2002 to 2006 were respectively blueberries (+100%), papayas (+100%), cherries (+91%), pineapples (+79%), dates (+76%), figs (+42%), avocados (+42%) and cranberries (+41%). In contrast, the following fruits had the highest declines in terms of consumption during the same period: apricots (-30%), nectarines (-27%), grapefruits (-19%), plums (-18%), peaches (-13%) and pears (-4%).

ORNAMENTAL SECTOR

Table 6-1 - Floriculture and Nursery Farms and Area

Product	1981	1986	1991	1996	2001	2006	2006/2001
Number of Farms							
Floriculture	X	3,180	6,283	4,340	4,024	3,578	-11%
Nursery	2,428	2,284	3,846	4,844	4,530	3,825	-16%
Area (ha)							
Floriculture	X	396	456	691	845	927	10%
Nursery	11,369	13,575	19,689	21,251	22,776	24,953	10%

Statistics Canada (Census of Agriculture)

The 2006 Census of agriculture shows that the total area in production for both floriculture and nursery has continued to increase, following the long-term trend in both sectors. The area under cultivation increased a total of 10% over the five years ending in 2006. A corresponding 10 to 15 year trend of decline in the total number of operations producing these crops indicates a trend towards fewer, but larger operations.

Table 6-2 - Floriculture and Nursery Farm Cash Receipts¹

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Quebec	155.9	153.5	154.2	173.0	205.0	228.1	239.2	232.8	241.0	259.0	7%
Ontario	577.4	664.6	811.3	842.3	925.3	935.8	941.3	961.8	987.1	1,043.5	6%
British Columbia	301.3	300.8	377.2	394.4	423.7	459.2	465.2	398.5	401.7	404.4	1%
Other Provinces	186.0	203.2	246.0	262.7	274.7	279.2	279.5	294.1	320.7	341.2	6%
Canada	1,220.6	1,322.1	1,588.7	1,672.4	1,828.7	1,902.3	1,925.3	1,887.2	1,950.5	2,048.1	5%

¹ Not including Christmas Trees and Sod

Statistics Canada (Table 002-0001, 21-001-X1B)

Farm cash receipts for the ornamental sector (excluding sod and Christmas trees) continue to grow with a national average annual increase of 5% to \$2.05 billion for 2007. The industry is concentrated in Ontario, British Columbia, and Quebec, which together account for about 85% of total production. While British Columbia's 2007 ornamental farm cash receipts were down 5% off their provincial 5-year average, the provinces other than Ontario, British Columbia, and Quebec, when considered together, experienced a 13% growth compared to their 5-year average.

Table 6-3 - Nursery Stock Sales

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Value (\$ Million)										
Quebec	49.2	45.5	48.1	48.1	57.8	68.6	66.3	67.5	70.4	4%
Ontario	136.3	194.4	229.2	229.9	245.4	243.9	261.1	283.1	284.0	0%
British Columbia	115.7	108.6	146.4	156.0	152.3	168.3	178.3	175.7	168.1	-4%
Other Provinces	36.9	37.6	51.8	55.1	61.6	62.8	63.2	65.1	72.8	12%
Canada	338.1	386.1	475.5	489.1	517.1	543.6	568.9	591.5	595.2	1%

2007 data not available

Statistics Canada (22-202-X1B)

Nursery stock including trees, shrubs, hedges, and a wide variety of other woody plants, while showing modest annual gains in 2006 of 1% nationally to \$595 million, nonetheless showed 6% growth nationally over the 5-year average production. All regions except British Columbia registered growth in 2006 when annual production value was compared to their 5-year average value of production. British Columbia's 2006 production was the same as the five-year average for the province at \$168 million.

Table 6-4 - Ornamental Flower and Plant Sales

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Value (\$ Million)										
Quebec	107.0	109.4	115.3	127.1	147.3	161.0	173.3	165.6	167.0	1%
Ontario	467.3	516.4	636.6	661.9	745.1	750.4	734.0	777.2	828.0	7%
British Columbia	205.3	225.3	266.4	273.5	312.3	331.6	329.7	263.8	317.5	20%
Other Provinces	124.3	160.2	187.8	204.5	211.9	207.0	204.1	217.7	202.6	-7%
Canada	903.9	1,011.3	1,206.1	1,267.0	1,416.6	1,450.0	1,441.1	1,424.3	1,515.1	6%

2007 data not available

Statistics Canada (22-202-X1B)

Flowers, non-flowering plants and bedding plants continued to show annual growth in the three major flower producing provinces, while the remaining provinces showed a slight contraction. Ontario had the most long-term growth with 2006 production at \$828 million, which is 8% above the 5-year average. British Columbia delivered the most rapid growth with a strong 20% increase in year-over-year value to \$318 million, however the comparison year of 2005 suffered almost 30% contraction from the year before. These contractions are connected to the rapid rise in the value of the Canadian dollar and the related effects on export revenue and costs.

Table 6-5 - Sod Sales

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	06/05
Value (\$ Million)										
Quebec	10.5	13.5	11.7	11.7	19.1	21.6	24.6	23.2	26.9	16%
Ontario	32.8	42.6	47.1	50.6	45.8	51.1	49.2	47.6	52.0	9%
British Columbia	3.7	2.8	2.2	2.7	5.2	6.2	6.6	7.0	10.0	43%
Other Provinces	8.8	11.3	13.0	11.2	11.9	24.9	25.6	26.8	39.0	46%
Canada	60.1	74.5	78.6	81.2	87.4	103.8	106.0	104.5	127.9	22%

2007 data not available

Statistics Canada (22-202-X1B)

Turf sod continued its long-term growth trend with record sales of \$128 million in 2006. Significant annual gains in sales were recorded across the country, with national year over year growth of 22%. Turf sod is used for lawns, sports fields and golf courses and consumption generally follows residential real estate growth trends.

Table 6-6 - Floriculture and Nursery Exports and Imports

Commodity	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
0601: Bulbs, tubers, tuberous roots, etc											
Exports	20.6	19.7	23.5	30.5	24.6	26.0	26.5	21.1	19.7	18.3	-7%
Imports	43.4	47.0	48.8	51.4	52.5	54.1	59.0	54.5	52.6	55.6	6%
Balance of Trade	-22.8	-27.3	-25.2	-20.9	-27.9	-28.1	-32.5	-33.4	-32.9	-37.3	13%
0602: Other live plants, including their roots, cuttings and slips, etc											
Exports	236.7	272.6	313.5	360.4	381.6	351.9	332.2	278.8	253.3	246.9	-3%
Imports	137.4	140.9	148.6	162.5	165.9	163.2	164.9	168.5	165.2	171.5	4%
Balance of Trade	99.3	131.7	164.9	197.9	215.8	188.6	167.3	110.3	88.1	75.4	-14%
0603: Cuts flowers and flower buds for bouquets or ornamental purposes, etc											
Exports	23.7	24.0	28.0	28.6	27.3	28.8	28.5	22.1	16.6	18.2	10%
Imports	92.5	93.3	100.5	112.3	117.5	111.0	114.9	116.4	117.9	123.4	5%
Balance of Trade	-68.7	-69.2	-72.5	-83.7	-90.2	-82.3	-86.4	-94.2	-101.3	-105.2	-8%
0604: Foliage, branches and other parts of plants, etc*											
Exports	43.0	40.8	44.3	50.1	44.6	36.0	29.9	29.7	34.1	29.2	-14%
Imports	16.6	17.5	17.2	18.4	19.0	16.7	17.2	18.4	20.9	24.6	18%
Balance of Trade	26.4	23.3	27.2	31.7	25.6	19.3	12.6	11.3	13.2	4.6	-65%
Total											
Exports	324.1	357.2	409.4	469.6	478.1	442.6	417.1	351.7	323.7	312.6	-3%
Imports	289.9	298.7	315.1	344.5	354.8	345.0	356.1	357.8	356.6	375.1	5%
Balance of Trade	34.2	58.5	94.3	125.0	123.3	97.6	61.0	-6.1	-32.9	-62.5	-437%

*Excludes Christmas Trees

Statistics Canada

For seven of the past ten years Canada had a positive balance of trade in ornamental horticulture. In the last three years the balance has shifted with an increase in the total value of imported cut flowers, live plants, branches, foliage and bulbs. The majority of our \$313 million in exports and \$375 million in imports are with the United States, but imports also arrive from historic trading partners like the Netherlands. A growing share of imports comes from emerging low-cost cut-flower producers like Ecuador, Columbia and Guatemala. Canada's total exports in 2007 were 15% lower in value than the previous five year average. During those five years the Canadian dollar gained almost 40% in value against the U.S. dollar, having an impact on cost competitiveness. While total floriculture and nursery exports only declined 3% between 2006 and 2007, British Columbia suffered a larger decline of 11% year over year which was a continuation of a seven year trend of year-over-year export declines for the province.

Table 6-7 - Floriculture and Nursery Exports by Province¹

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
New Brunswick	32.2	37.0	36.5	40.8	40.0	35.5	33.1	32.6	30.7	30.0	-2%
Ontario	213.7	225.3	258.3	293.7	299.3	273.3	253.1	194.5	172.6	174.3	1%
British Columbia	53.6	69.3	87.0	102.3	101.3	98.9	96.5	92.4	92.1	82.0	-11%
Other Provinces	24.6	25.7	27.5	32.8	37.5	34.9	34.5	32.2	28.6	26.5	-7%
Canada	324.1	357.2	409.4	469.6	478.1	442.6	417.1	351.7	324.0	312.8	-3%

¹ Excludes Christmas Trees

Statistics Canada

Table 6-8 - Christmas Tree Production

Province	1996	2001	2006	2006/2001
Number of Farms				
Quebec	562	395	353	-11%
Nova Scotia	808	535	437	-18%
Ontario	1,345	918	725	-21%
British Columbia	390	526	481	-9%
New Brunswick	592	252	190	-25%
Other Provinces	380	307	275	-10%
Canada	4,077	2,933	2,461	-16%
Area (ha)				
Quebec	12,342	8,695	7,892	-9%
Nova Scotia	11,582	9,490	9,134	-4%
Ontario	11,286	8,808	6,392	-27%
British Columbia	9,453	6,018	3,565	-41%
New Brunswick	4,284	2,928	2,214	-24%
Other Provinces	2,124	2,000	1,433	-28%
Canada	51,071	37,613	30,630	-19%

Statistics Canada (Census of Agriculture)

The number of farms undertaking Christmas tree production and the amount of land dedicated to Christmas tree production in Canada have both declined by 40% over the past decade. In 2007 Canada exported 2.5 million Christmas trees worth \$29.8 million, which is 15% lower than the ten year average exports, by quantity. Despite growing a smaller acreage in Christmas trees than previous years, the quantity of trees exported from New Brunswick bounced back 28% in 2007 which returned the quantity to the ten-year average export volume. Quebec recorded the biggest losses in volumes exported with a 14% annual drop in export volume to 943,000 trees, which is 26% less than their ten year average volume. The appreciation of the Canadian dollar, changing demographics, and competition from artificial Christmas trees put pressure on demand and prices in the U.S, their major export market.

Table 6-9 - Christmas Tree Exports by Province

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Value (\$ Million)											
Nova Scotia	9.4	9.0	9.6	11.0	11.1	9.9	10.8	10.9	10.6	8.5	-20%
New Brunswick	5.2	4.6	5.7	6.3	6.4	5.7	5.3	4.8	4.8	4.8	0%
Quebec	19.6	20.6	22.6	25.7	25.5	21.9	19.4	18.1	18.7	15.7	-16%
Other Provinces	2.0	0.8	0.7	0.8	0.9	0.6	0.7	1.0	0.8	0.8	-1%
Canada	36.2	35.0	38.6	43.8	43.9	38.0	36.2	34.8	34.9	29.8	-15%
Quantity ('000 Trees)											
Nova Scotia	781.5	727.5	720.6	742.1	898.6	819.6	873.6	864.0	789.0	784.2	-1%
New Brunswick	335.6	298.4	354.6	363.3	383.3	393.4	384.3	405.5	284.0	362.2	28%
Quebec	1,362.0	1,376.6	1,417.9	1,496.8	1,432.4	1,347.6	1,153.8	1,038.0	1,098.8	943.7	-14%
Other Provinces	167.6	89.1	43.1	57.0	55.7	65.0	62.4	80.2	82.4	87.0	6%
Canada	2,646.7	2,491.6	2,536.3	2,659.2	2,770.0	2,625.6	2,474.0	2,387.6	2,254.2	2,177.1	-3%

Statistics Canada

MAPLE AND HONEY SECTORS

Table 7-1 – Canadian Maple Production by Province

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Volume (t)											
Quebec ¹	25,844	31,185	41,310	28,267	32,813	39,927	41,283	34,483	32,664	27,989.00	-14%
Ontario	1,054	1,395	2,230	1,334	1,376	1,310	1,310	1,310	1,304	1,346	3%
New Brunswick	775	607	451	475	884	956	1,052	1,238	1,526	1,358	-11%
Nova Scotia	132	192				180	132	126	156	162	4%
Canada	27,805	33,379	43,991	30,076	35,073	42,373	43,777	37,157	35,651	30,855	-13%
Value (\$ ' 000)											
Quebec	136,130	140,566	156,117	136,037	156,731	188,096	204,115	173,477	164,000	144,400	-12%
Ontario	8,285	10,719	17,696	10,825	11,063	10,750	10,928	10,988	11,147	12,088	8%
New Brunswick	5,768	4,109	3,231	3,396	5,849	6,845	8,044	8,934	10,878	10,702	-2%
Nova Scotia	918	1,333				1,395	1,068	1,054	1,045	1,067	2%
Canada	151,101	156,727	177,044	150,258	173,643	207,086	224,155	194,453	187,070	168,257	-10%
Value (\$/kg)											
Quebec	5.27	4.51	3.78	4.81	4.78	4.71	4.94	5.03	5.02	5.16	3%
Ontario	7.86	7.68	7.94	8.11	8.04	8.21	8.34	8.39	8.55	8.98	5%
New Brunswick	7.44	6.77	7.16	7.15	6.62	7.16	7.65	7.22	7.13	7.88	11%
Nova Scotia	6.95	6.94				7.75	8.09	8.37	6.7	6.59	-2%
Canada	5.43	4.7	4.02	5	4.95	4.89	5.12	5.23	5.25	5.45	4%

¹ Quebec data between 1997 and 2005 come from la Table filière acéricole du Québec while 2006

and 2007 data come from Statistics Canada

% Change from 2006 to 2007

Canada and the United States are the only two maple syrup producing countries in the world. Over the last five years, Canada has accounted for 85% of the world's maple syrup production, while the United States has accounted for 15%. Canada exports over 80% of its production.

The Canadian maple syrup producing provinces are Quebec, with 91% of domestic production in 2007, followed by New Brunswick (4.4%), Ontario (4.4%), and Nova Scotia (0.5%). There is also maple production on Prince Edward Island, though in small volumes.

According to the 2006 Census of Agriculture from Statistics Canada, about 9,731 farms (4.2% of all farms in Canada) produced maple syrup commercially, down 6% from 2001. Between 2001 and 2006, the average per-farm tap number increased by 20% from 3,268 to 3,913.

Production of maple products decreased from 2006 by almost 4,800 metric tons (800 thousand gallons). Quebec, which generates the majority of Canadian maple products, reported 14.3% lower production volume which can be attributed to poor weather conditions in parts of the maple growing regions. Despite the drop in volume, prices in Quebec rose only slightly to \$5.16 per kilogram (\$31 per gallon). The total value of maple products (syrup, candy, sugar) in Canada was 10.0% less than in 2006, with \$168 million worth sold in 2007. With three years of decreased harvests, compared to the large harvests of 2003 and 2004, a substantial amount of the stored inventory of maple from previous seasons has been consumed. Maple production in Quebec is supply-managed to control surplus production. As inventories decline, some upward pressure on prices could be expected, depending on how much additional (currently untapped) maple production is added.

Table 7-2 – Canadian Honey Production by Province

Province	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Volume (t)											
Prince Edward Island	58	50	36	59	52	52	41	24	25	23	-8%
Nova Scotia	412	524	363	285	342	374	357	331	289	318	10%
New Brunswick	202	122	120	96	145	120	88	101	135	56	-59%
Quebec	2,116	1,847	1,159	1,219	1,683	651	923	1,747	1,565	1,066	-32%
Ontario	4,776	3,740	3,249	3,219	4,824	3,903	3,456	4,055	3,760	2,544	-32%
Manitoba	9,181	7,511	6,033	7,094	6,511	6,604	5,362	5,717	8,485	5,547	-35%
Saskatchewan	9,906	10,886	8,165	9,752	8,618	8,845	6,804	8,167	11,343	5,819	-49%
Alberta	17,388	11,251	10,926	12,150	13,488	12,630	15,187	14,463	21,205	12,477	-41%
British Columbia	2,044	1,166	1,806	1,513	1,408	1,422	2,025	1,514	1,559	1,032	-34%
Canada	46,083	37,099	31,857	35,388	37,072	34,603	34,242	36,119	48,366	27,850	-42%
Colony Yield and Price Data											
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	07/06
Number of Colonies	563,614	588,824	599,863	602,328	588,485	563,330	597,890	615,541	628,401	601,119	-4%
Yield - lbs per colony	180	139	117	130	139	135	126	129	170	106	-38%
Price per lb.	\$0.92	\$0.86	\$0.99	\$1.19	\$1.97	\$2.04	\$1.60	na	\$1.04	na	na

While honey is produced in all provinces in Canada, Alberta, Manitoba and Saskatchewan together produced over 85% percent of Canadian honey in 2007. Honey production in 2007 totalled 27,850 metric tons (61.4 million pounds), a 42% drop from 2006's record annual production of 48,366 metric tons (106.6 million pounds). While bee populations in each hive are reduced over every winter, higher than normal winter losses from the winter of 06/07 affected production the following year. The yields per colony declined to 111 pounds of honey per hive, the lowest output in 15 years, partly due to colony splitting to start fresh hives. The number of colonies fell by 11.6% between 2006 and 2007. Canada continues to import honey, however the volume of imports has been declining over the past five years. Imported honey, primarily from Argentina and Australia, at 9.4 million pounds in 2007, is less than half the quantity imported in 2004. Canada will continue to be an important net exporter of honey, exporting an average of 40% of its production over the past five years. Honey exports in 2007 totalled \$37.5 million, a 14% increase over 2006.

Contact

This report was prepared by Agriculture and Agri-Food Canada's Horticulture and Special Crops Division. For further information, please contact:

Farid Makki

Senior Market Development Advisor
Horticulture and Special Crops Division
Agriculture and Agri-Food Canada

Mailing Address: Agriculture and Agri-Food Canada
 1341 Baseline Road, Tower 5, Floor 5
 Ottawa, ON
 K1A 0C5

Telephone: (613) 773-0262
Facsimile: (613) 773-0299
e-mail: makkif@agr.gc.ca